

A close-up photograph of two pairs of hands, one in a white lab coat and one in a blue lab coat, gently cupping a small mound of dark soil. A tiny green seedling with three leaves is growing out of the soil.

# IDENTIFYING CORE VALUES

Saroj Misra, DO, FACP



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A photograph of a person with long brown hair, wearing a blue hooded jacket, standing in a dense forest of tall, thin trees. The person is seen from behind, looking down a path that leads into the woods.

HOW DO YOU KNOW RIGHT FROM WRONG?

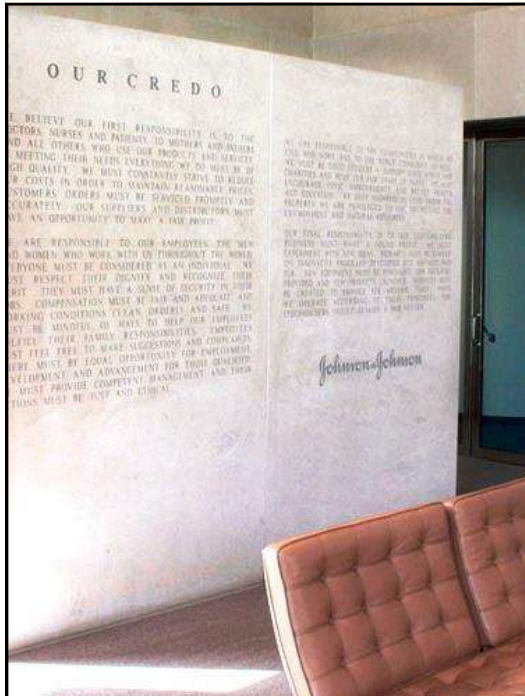
# WHAT GUIDES YOU?

## NOT ALWAYS EASY – WHY, WHAT, HOW AND WHERE

- ▶ As physicians and educators, we often get caught up in the **'WHAT'**
- ▶ We don't often think about the **'WHY'**
- ▶ If we don't know why we do something:
  - ▶ We can't know **what** to do
  - ▶ We won't know how to do **what** we do
  - ▶ We won't know **where** we are going

## GOALS AND OBJECTIVES FOR TODAY

- ▶ By the end of this discussion, you will be able to
  - ▶ **Define** terminology: mission, vision, core value, core purpose
  - ▶ **Understand** why residency programs can benefit from a core value statement
  - ▶ **Develop** an approach to creating core value statements
  - ▶ **Determine** when and why to review your core value statements



## STEP 1

# UNDERSTANDING WHAT A CORE VALUE IS

### IDENTIFYING CORE VALUES FOR RESIDENCY

## WHAT IS A CORE VALUE?

- ▶ Guiding principles that dictate behavior
- ▶ Help individuals to understand right and wrong
- ▶ Help organizations to understand if they are on the right path & fulfilling goals

**Create an unwavering and unchanging guide**

## CORE VALUE CHARACTERISTICS

- ▶ Generally a small set (no more than 3-5 ideas/statements)
- ▶ They require no external justification
- ▶ They have intrinsic value/importance to the organization
- ▶ They 'stand the test of time'
- ▶ They are insensitive to current environments, competitive requirements or fads

## EXAMPLES OF CORE VALUES – OTHER INDUSTRIES

*'No cynicism; imagination and wholesomeness'*



IDENTIFYING CORE VALUES FOR RESIDENCY

## EXAMPLES OF CORE VALUES – OTHER INDUSTRIES

*'Don't be evil'*



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## EXAMPLES OF CORE VALUES – OTHER INDUSTRIES

*'You're gonna' like the way you look - I guarantee it!'*



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## EXAMPLES OF CORE VALUES – OTHER INDUSTRIES

*'Reach, Learn, Di-bear-sity, Colla-bear-ate, Give, Cele-bear-ate'*



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## EXAMPLES OF CORE VALUES – OTHER INDUSTRIES



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# EXAMPLES OF CORE VALUES – OTHER INDUSTRIES

*Comprehensive Care*



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*Continuous  
Healing  
Relationships*

*Care Delivered in the Context of  
Family and Community*

*Whole-Person  
Orientation*

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## CORE VALUES: A CASE STUDY

JOHNSON & JOHNSON - 1982

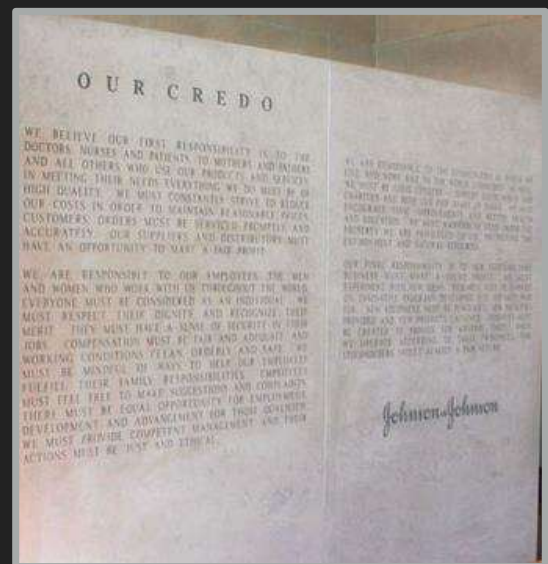
REPORTS OF CYANIDE POISONING IN TYLENOL BOTTLES  
- 7 INDIVIDUALS DEAD

ONE WEEK LATER - J&J PULLS ALL 31,000,000 BOTTLES  
OF TABLETS FROM RETAILERS

J&J PRESIDENT HAS DEVELOPED TAMPER-RESISTANT  
'GELCAPS' & TRIPLE SEALS SAFETY CONTAINERS

COST: \$100,000,000

REGAINED 100% OF MARKET SHARE



## CORE VALUES: A CASE STUDY – WHAT WAS LEARNED

- ▶ Core values can be very powerful when applied consistently and in spite of ‘conventional wisdom’
- ▶ Oftentimes, they can result in short-term challenges
  - ▶ Financial
  - ▶ Professional
  - ▶ Public Opinion
- ▶ BUT, if held to - **they can engender trust**
  - ▶ Stakeholders and customers

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## OTHER CONCEPTS-CORE PURPOSE

- ▶ An organization’s **reason** for being
- ▶ Not a goal or organizational strategy
- ▶ Characteristics
  - ▶ Cannot be fulfilled
  - ▶ Can’t be done individually, but can be worked at **collectively**
  - ▶ Answer’s the question:

***“Why is that [the things we do/provide] important?”***

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## OTHER CONCEPTS - MISSION

- ▶ A **mission statement** defines the **present** state/purpose of an organization and answers three questions:
  - ▶ **What** it does
  - ▶ **Who** it does for
  - ▶ **How** it does what it does

*Missions are about today*

## MISSION STATEMENT - EXAMPLES

- ▶ Target - 'To make Target the preferred shopping destination for guests...'
- ▶ Patagonia - 'Build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis.'
- ▶ **ACGME - 'We improve health care and population health by assessing and advancing the quality of resident physicians' education through accreditation.'**

## OTHER CONCEPTS - VISION

- ▶ A **vision statement** defines the optimal desired future state of what an organization wants to achieve over time
- ▶ Vision statements provide guidance on what an organization wants to achieve in five, ten or more years
- ▶ Usually, they are written in **succinct** and **inspirational** styles

***Vision statements focus on the future***

## VISION STATEMENT - EXAMPLES

- ▶ Alzheimer's Association - 'Our Vision is a world without Alzheimer's disease.'
- ▶ Amazon - '...to be earth's most customer centric company; to build a place where people can come to find and discover anything they might want to buy online.'
- ▶ Habitat for Humanity - 'A world where everyone has a decent place to live.'

## VISION STATEMENT - EXAMPLES

### ► ACGME - 'We imagine a world characterized by:

- A structured approach to evaluating the competency of all residents and fellows,
- Motivated physician role models leading all GME programs,
- High-quality, supervised, humanistic, clinical educational experience, with customized formative feedback,
- Clinical learning environments characterized by excellence in clinical care, safety, and professionalism,
- Residents and fellows achieving specialty specific proficiency prior to graduation,
- Residents and fellows prepared to become Virtuous Physicians who place the needs and well-being of patients first.

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## MISSION VS. VISION: COMPARISON

	Mission	Vision
Answers	Why?	What?
Definition	Statement	Snapshot
Length	Short	Long
Purpose	Informs	Inspires
Activity	Doing	Seeing
Source	Head	Heart
Order	First	Second
Effect	Clarifies	Challenges

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## MISSION & VISION – SHOULD I HAVE BOTH??

- Pros and Cons
  - Technically identify two different states - now and future
  - Can delineate between organization's function and aspiration
  - They may compete with one another
    - Sacrifice today's need for tomorrow's dream or vice versa
    - May be hard to remember
    - Employees/customers/stakeholders may fail to see the difference



STEP 2

WHY DOES IT  
MATTER FOR  
RESIDENCY?

## WHAT IS A CORE VALUE?

- ▶ Guiding principles that dictate behavior
- ▶ Help individuals to understand right and wrong
- ▶ Help organizations to understand if they are on the right path & fulfilling goals

*Create an unwavering and unchanging guide*

## INTERNAL AND EXTERNAL DRIVERS

- ▶ Creates a **common standard** to hold residents to
  - ▶ Serves as a set of guidelines that can dictate/correct action
- ▶ Can be a way to **invest residents** in program (if involved in development/revision)
- ▶ This is an **expectation** of our organizations and the medical profession
  - ▶ ACP
  - ▶ HRSA and Community Health Center (CHC)
  - ▶ Most health care systems

“THE PURPOSE OF GRADUATE MEDICAL EDUCATION IS TO FULFILL A COVENANT THAT THE MEDICAL PROFESSION HAS WITH SOCIETY TO PROVIDE COMPETENT PHYSICIANS TO CARE FOR SOCIETY’S ILL.”

Hershey Bell

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### STEP 3

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## DEVELOPING & REVIEWING A CORE VALUE STATEMENT

FIRST, A WARNING...

IF YOU'RE NOT WILLING TO ACCEPT THE PAIN REAL VALUES INCUR, DON'T BOTHER GOING TO THE TROUBLE OF FORMULATING A VALUES STATEMENT.

Patrick Lencioni - Harvard Business Review

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## DEFINED PROCESS

### ► Step 1 - **Determine** key people's **values**

- System, DIO/DME, Core faculty, residents, staff, non-core faculty
- Consider an email:

***'We're working on defining our core values explicitly so everyone is on the same page...the purpose of this email is to ask what everyone's personal values are... please email 4 or 5 values that you live by (or want to live by) that define who you are or who you want to be...each value should be one word or at most a short phrase (but ideally one word)... please email the values that are significant and meaningful to you personally, not necessarily having anything to do with the residency's values.'***

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## DEFINED PROCESS

- ▶ Step 2 - **Combine** stakeholders' **values**
  - ▶ Should be done by small group: PD/APD, Core faculty, Chief resident
  - ▶ Consider time frames when developing
    - ▶ Prior to beginning of academic yr
    - ▶ Within first 3 months of academic yr
  - ▶ Use PEC or Faculty development time

## DEFINED PROCESS

- ▶ Step 3 - **Test values** against employees' perceptions & opinions
  - ▶ Consider another email:
    - ▶ *"We've been working on a 'Core Values' document, and the first draft of it is below. Please take the time to read it over and email me (do not cc everyone) any suggestions, additions, subtractions, or other feedback.*
    - ▶ *In particular, **think about any individuals that you think represent our culture well, and whether what you like** about those individuals **is covered by the X core values proposed** below. Conversely, think about any individuals that you think do not represent us well, and whether the reason behind it is due to them not representing one or more of the core values below.*
    - ▶ *This is a very important document, as we will give the final version to all residents, faculty and staff. **It will be more or less permanent for all the future years of our program**, so your input is very important. Please make sure you set aside the time to read and think about it."*

## DEFINED PROCESS

► Step 4 - **Test your commitment** (discuss scenarios)

- Would you be willing to reject a candidate who didn't fit the core values, even if they were outstanding in other areas?
- Would you be willing to accept a candidate who did fit the core values, even if they weren't outstanding in other areas?
- What about faculty? Employees?

► Step 5 - **Revise** your core values statement

- You cannot make everyone happy!!



"That's our new mission statement.  
The committee had a difficult time  
agreeing on anything else."

## DEFINED PROCESS

► Step 6 - **Integrate Core Values** into everything you do

- Performance - Evaluations, Promotion, Termination
- Events - Orientation and Graduation
- Committee Meetings - CCC, PEC, GMEC

## MY CORE VALUE STATEMENT



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## NEXT STEPS - REVIEW

- ▶ Ideally core value statements should rarely change - 'stand the test of time'
- ▶ But they should be reviewed annually to remind stakeholders of importance
- ▶ Situations which may warrant review and (possibly) revision:
  - ▶ Leadership change (PD or DME/DIO)
  - ▶ System change
  - ▶ Catastrophe - Resident or faculty termination, others

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Image courtesy of Helloquence

FINAL STEP

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# PRACTICE

FIRST, A CAVEAT:



## THOUGHT LEADERS

YOU WILL NOT DISCOVER YOUR CORE VALUES DURING THE \$99 SEMINAR AT THE HOLIDAY INN

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## DEVELOPING CORE VALUES STATEMENTS – PRACTICE FOR TWO

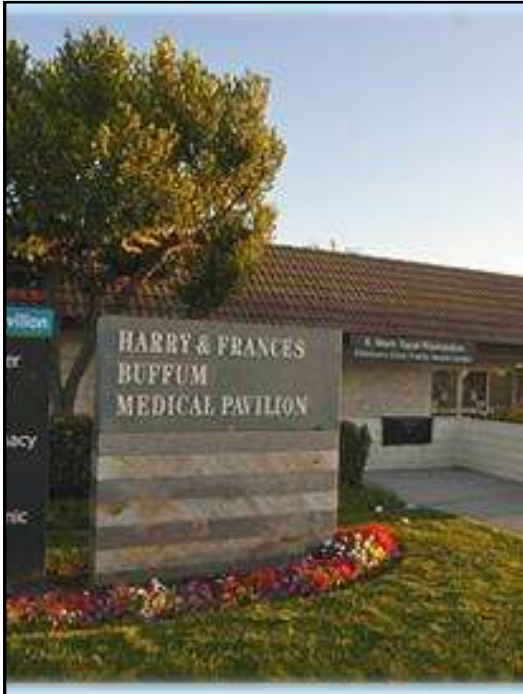
- ▶ What you need: 40-50 Index Cards, Pen (or two), space for 40-50 Index Cards
- ▶ Start with the question, 'What is important in our residency and what is unique about working/learning here?' (2 minutes)
- ▶ Put each idea on it's own index card, stack them up, then spread them out
- ▶ Organize your cards into groups with similar features; create a 'parking lot' for cards that don't fit into a group
- ▶ Find a key word that summarizes each group of cards
- ▶ These key words are your core values - further define them but use your words to do so

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IN CARRYING OUT OUR  
MISSION AND GOALS,  
WE MAINTAIN CORE  
VALUES OF RESPECT,  
SCIENTIFIC DISCIPLINE,  
INTEGRITY, PIONEERING  
SPIRIT, AND  
STEWARDSHIP

Group Health  
Cooperative Family  
Medicine Residency



EXCELLENCE  
ETHICS  
HARMONY AND  
COLLABORATION  
SOCIAL CONSEQUENCES  
INNOVATION

Long Beach Memorial  
Family Medicine  
Residency Program



FAMILY-N-U  
CULTURE

FREE EXCHANGE OF IDEAS  
APPROPRIATE LEVELS OF  
RESPONSIBILITY  
MANAGEMENT THROUGH  
SERVICE  
INITIATIVES FOR EXCELLENCE  
LEARNING FOCUS  
YOU ARE VALUED  
NOT GOOD ENOUGH  
UNIFIED TEAM APPROACH

Northeast Iowa Family Medicine Residency Program



## SUMMARY

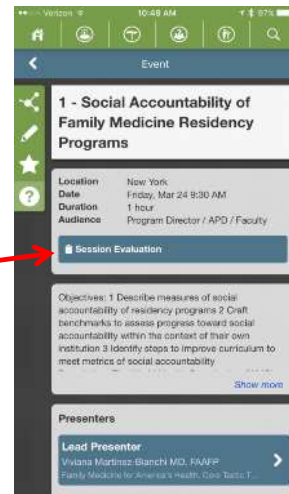
- ▶ Understanding what missions, visions and core values are is critical to your program's pathway
- ▶ Residencies benefit by defining these things because they fulfill professional expectations
- ▶ Creating a core values statement follows a defined process which involves multiple stakeholders
- ▶ Periodically, core value statements should be reviewed and, if needed, revised



Image courtesy of Christian Holzinger

Please  
complete the  
session evaluation.

Thank you.





## IDENTIFYING CORE VALUES FOR RESIDENCY

# (RE)SOURCES

- ▶ '10 Steps for Developing Your Company's Core Values' - <http://deliveringhappiness.com/services/10-steps-for-developing-core-values/>
- ▶ 'Vision and Mission - What's the difference and why does it matter?' - <https://www.psychologytoday.com/blog/smartwork/201004/vision-and-mission-whats-the-difference-and-why-does-it-matter>
- ▶ 'Mission Vs. Vision: What's The Difference?' - <http://www.glennsmithcoaching.com/mission-vs-vision-whats-difference/>
- ▶ 'Make Your Values Mean Something' - P. Lencioni *Harvard Business Review*, July 2002; <https://hbr.org/2002/07/make-your-values-mean-something#>
- ▶ 'How to Create Your Own Core Values List' - <http://www.threadsculture.com/blog/company-culture/how-to-create-your-own-core-values-list/>
- ▶ 'Mission Statements: What Do They Tell Us About Family Medicine Training Programs?' - Bhat-Schelbert, K et al *Fam Med* 2004;36(4):243-7 (<https://www.stfm.org/fmhub/fm2004/April/Kavitha243.pdf>)
- ▶ 'The Path to Professionalism: Cultivating Humanistic Values and Attitudes in Residency Training' - Markakis, K et al *Academic Medicine*, 2000;75(2):141-50 (<http://medical-mastermind-community.com/uploads/86-cultivating-humanistic-values-a-benchmark-paper.pdf>)
- ▶ 'Task Force 1. Report of the Task Force on Patient Expectations, Core Values, Reintegration, and the New Model of Family Medicine' - Green, L et al *Annals of Family Medicine*, 2004: Vol. 2, Supplement 1 ([http://www.annfammed.org/content/2/suppl\\_1/S33.full.pdf](http://www.annfammed.org/content/2/suppl_1/S33.full.pdf))
- ▶ '7 Core Values Statements That Inspire' - <http://fortune.com/2015/03/13/company-slogans/>

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