IntegratedEthics *in Action*

OPERATIONALIZING INTEGRATEDETHICS AT A VISN LEVEL: THE ROLE OF VISN CONFERENCES

*W*ith IntegratedEthics (IE) is in its third year of implementation, many program staff are focusing on broader dissemination and integration strategies. Others continue to seek basic guidance and education to develop the program. IE staff at all experience and exposure levels have requested opportunities to meet with colleagues at other facilities to share strong practices, challenges and successes they have encountered in the course of developing and sustaining their IE programs.

To meet these differing needs, several VISNs held network-wide IE conferences during FY09. This article describes full-day, face-to-face meetings that were mounted by VISNs 3, 18, and 23, plus a teleconference that was hosted by VISN 18 using Microsoft Office Live Meeting technology. Contributors Barbara Chanko, RN, MBA (VISN 3), Maria Andrews, MS, FACHE (VISN 18), and Sheryl Kittelson (VISN 23) recently discussed how their conferences shared implementation strategies, offered additional education, and provided networking opportunities for IE program staff across their respective VISNs.

What were the conferences' learning objectives?

The primary goals for the programs were generally twofold: 1) to enhance understanding of key IE program areas, and 2) to share promising practices of program implementation between facilities. These goals, in turn, were designed to support the National Center for Ethics in Health Care's overarching aim to develop IE-proficient staffs that can establish and maintain robust IE structures at the facility and VISN levels.

Emphasis related to specific IE program areas varied. While all four programs presented content on Ethics Consultation and Preventive Ethics, VISN 3 and 23's programs also included break-out activities related to Ethical Leadership, VISN 18 held a face-to-face meeting and educational opportunity for the VISN IE Committee members, and VISN 23 provided a session on IE Council development and enhancement.

VISN 3's conference sought to "ensure that the transition of membership on core IE function teams, IE Councils and the VISN IE Advisory Board (IEAB) is well managed," and "increase communication between IEAB members and their counterparts in the facilities."

Ms. Kittelson's conference had similar objectives. "Getting people together to share ideas only makes the program stronger," she said. She believes that the Ethical Leadership content was especially important because, often, discussions about ethics among leadership are not being translated to the wider facility. "We feel like we're incorporating ethics in our decision-making process but need to ensure we build it into communications that we give about decisions that are happening." Consequently, a key objective for VISN 23's conference was to help facilities integrate the program into day-to-day operations.

The specific objective of the VISN 18 Live Meeting call was to educate members of the VISN IE Councils on the basics of the CASES approach and ISSUES cycle. Ms. Andrews reported that this session was important be-

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cause, in her experience, facility IE Councils are not necessarily educated on the specifics of these tools.

How were the conferences conceived?

At all three VISNs, the impetus for the conferences emerged from network-level IE committees (such as the IEAB), which determined that a conference would be an efficient way to meet stated needs for delivering additional training and bringing people together. While all three VISNs reported using program enhancement funds supplied by the Ethics Center to fund travel (when needed) and honoraria for guest speakers and refreshments, Ms. Kittelson said her VISN Education Service included funds for an IE conference in their FY09 budget.

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Leadership buy-in, however, was also critical. At VISN 3, the Senior Lead, Stephen Musser, attained support from Network Director Michael A. Sabo. While Mr. Sabo could not attend the conference, he did send a welcoming greeting to the attendees, which stated in part, "Your work here today and back at the facilities will be the catalyst for the organizational change in ethics practice that is our priority."

As Associate Director at her facility, Ms. Andrews obtained the endorsement of her VISN's Network Director (Susan Bowers) and used her influence with colleagues throughout the VISN to gain support for the conference. She received endorsement for the Live Meeting from the VISN 18 Organizational Development Board and Executive Health Care Council.

Who was invited? Who attended?

Attendance at the face-to-face conferences included VISN and facility IE Committee members, IE Program Officers (IEPOs), Ethical Leadership Coordinators (ELCs), Preventive Ethics Coordinators (PECs), and Ethics Consultation Coordinators (ECCs). Ms. Kittelson said that her VISN also invited CBI officers and Facility Directors. The VISN 18 Live Meeting was announced to all of the facilities' staff via an e-mail invitation from the Director's Office.

All three contributors reported that their live conferences were well-attended: 30-40 people were at each of VISN 18 and 23's conferences, and 70 came to the VISN 3 conference. Most importantly, at both the live conferences and on the Live Meeting, all roles and facilities were represented.

How was the content developed?

The three VISNs convened planning committees composed of IE function coordinators and/or EES representatives. With feedback from members of the Ethics Center and Councils, the committees performed a needs assessment, solicited speakers, and developed the agenda.

"We surveyed all of our program staff at the facilities to get feedback about useful content and areas to explore for developing the breakout session content," said Ms. Kittelson. "Our VISN IE Council expressed the need to reserve some hands-on time to work within various disciplines, especially Preventive Ethics and Ethics Consultation, which prompted Day 2 of our program that included breakout sessions for each of the program roles. For PE we received some good feedback that teams didn't want to be lectured to; they wanted to have an opportunity to share ideas about their ISSUES cycles. Robin Cook, PE Advisor for the Ethics Center, recommended that all participants should present an ISSUES cycle. It didn't have to be completed; the idea was for participants to share what they've done so far, as well as strategies about how to move forward. Peers gave feedback on what went well, and what they could potentially do differently."

Conference planners for VISN 3's conference wanted to cover all of the functions and mix knowledge and skill-building. In addition, their conference offered something different, a lunchtime lecture by the six attorneys from the Regional Counsel (RC) titled, "The Interplay Between Law and Ethics in Health Care." This topic was developed in response to findings on the IE Staff Survey that few staff knew when to contact the RC about ethics concerns. "RC attorney **Kate Tulloch, JD**, asked her colleagues if they could use the

conference as an opportunity to educate people in the VISN about what RC does," Ms. Chanko explained. "I was thrilled that they wanted to participate. I wrote a list of questions for the attorneys that had arisen during meetings of the ethics committee or IEAB." Examples of the questions were:

- How can ethics consults quickly identify government ethics concerns that should be addressed by RC?

- How can ethics consultants work more closely with RC to understand how the law applies in certain situations?

How were the conferences structured and what are some examples of topics that were covered?

While VISN 3 and 23's conferences included both plenary and break-out sessions, VISN 18's conference consisted of two parallel-track "Learning Collaboratives" focusing on EC and PE, respectively. VISN 23's conference extended for a day and a half, with day 1 (the half day) focusing on the topics of ethics culture and ethical leadership, and day 2 focusing on IE Council development as well as breakout sessions devoted to the three function areas.

While the full program for each conference is listed in the box, "Conference Dates, Places, and Agendas," contributors reported the following highlights:

- **VISN 3:** The third item on the agenda, "State of IE in VISN 3," featured presentations by each IEPO on the state of their program, which, according to Ms. Chanko, "made facilities proud." Other highlights included the abovementioned RC presentation as well as a breakout session on Preventive Ethics where participants were asked to act as a VISN-wide PE team to examine the ethics quality gap surrounding inconsistent practices for discharges against medical advice.

- **VISN 18:** For the face-to-face learning session, the PE track focused on successes and concerns that PECs have encountered while conducting the ISSUES cycles, featuring Mary Beth Foglia from

the Ethics Center as the program facilitator. Their EC track featured a discussion by community subject matter experts and the VISN 18 ethicist, Dr. Cynthia Geppert (New Mexico VAHCS), on such topics as ethical theory, resource allocation, and ethical decision-making during pandemic situations. The Live Meeting contained practical information on the PE ISSUES cycle and EC CASES approach.

- **VISN 23:** Proceedings began with welcoming remarks from the Acting Network Director who emphasized that ethics—including business ethics—are important and communicated support for the IE program. In the EC breakout session, Ms. Kittelson asked three ECCs to demonstrate how they had actually worked with the CASES approach. In addition, facilities whose members had attended a Beyond the Basics (ethics consultation) workshop shared their proficiency assessment action plans. EC-Web reports were reviewed, and discussion centered on how they could be used by Councils and the Network to improve overall program quality and effectiveness. The breakout for ELCs focused on the new policy handbook, as well as how to integrate the program into day-to-day operations.

What feedback was received?

Audience reactions to all three conferences and the Live Meeting were positive. Ms. Chanko said that participants felt VISN 3's conference was so successful that they asked the VISN for three similar training days that would be specifically designated for IE teams, EC and PE. In addition, RC member Ms. Tulloch who led the law and ethics presentation commented, "It seems that whenever lawyers get together with clinical staff a lively discussion ensues and this occasion was no exception. The frank dialogue led to a greater understanding of what RC attorneys can and cannot do to facilitate results that have been identified as ethically desirable by IE program staff."

According to VISN 18 conference attendee **Linda Willmore** (Core member, Ethics Advisory Committee, VA Southern Arizona HCS), "During the Learning Collaborative, interaction with participants was encouraged, which gave us the chance to apply our own experiences to ethical concepts." Added **Patti**

Logue, (ECC, El Paso VA Health Care System), "The Learning Collaborative helped me to realize the importance and depth of ethics theory and its actual application to workplace issues and practices."

Scott Foster (IEPO, Iowa City VAMC), who attended VISN 23's conference, said, "I enjoyed the opportunity to talk directly with the national Ethics Center staff, who offered many constructive suggestions for improving our PE storyboards. I returned from the conference feeling more comfortable with accessing the national staff. I realize now that they're there to help." **Geralyn Krsnak** (PEC, Sioux Falls VAMC) added, "We heard everyone else's progress on their ISSUES cycle. We received ideas for a cycle, knowing that everyone is 'in same boat.' Since the conference, I've been talking with people I met there about the responsibilities of the Preventive Ethics Coordinator."

What are recommendations for other VISNs who are planning to mount an IE conference?

- Elicit leadership commitment and involvement.

- Seek advice from the Ethics Center program staff on how to frame content.

- Solicit active participation from each functional area on the planning committee to make sure that the learning needs are appropriately addressed.

- If possible, schedule the conference in the third quarter of the fiscal year. Such timing allows participants to reflect on what they've accomplished, focus on tasks that remain, and begin planning for the following year.

- When scheduling the conference, consider travel needs. If people are coming from long distances, you might want to consider planning a shorter day, or devote sessions happening later in the day to intra-facility discussions that can be continued at a later time.

- Invite local facility leaders or IEPOs to participate as faculty members.

- Give people as much notice as possible, even for teleconferences.

What palpable impact has the conference had on the development and maintenance of the IE program in your VISN?

Ms. Andrews said that the VISN 18 conference served to not only enhance IE knowledge and facilitate IE networking, but also gave the EC and PE attendees a much clearer understanding of their role.

As part of its EC proficiency plan, VISN 23 plans to feature a case study of the month. Every month, a site will be designated to post a de-identified case study on a shared drive for review by the Network's EC group. Their peers will then post feedback on a Network IE SharePoint site about how effectively they feel the CASES model was applied. The goal is to build a library of case studies that can be accessed for internal facility education and proficiency improvement purposes. Other content planned for the SharePoint site includes educational resources and information about facility events.

Ms. Chanko believes that the conference has had a lasting effect for VISN 3. "Before the conference, the five hospitals were each trying to do their own thing. Now, people are more likely to contact each other. Because they were able to discuss challenges openly, people are more willing to talk about challenges and solutions. This is the first time we tried to bring everyone together. They now feel like part of a larger community."

The National Center for Ethics in Health Care is always interested in supporting your VISN retreat planning needs with suggestions and, if requested, a site visit and presentation tailored to your particular training goals. If you are interested in learning more about this opportunity, please contact:

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Breaking the Ice at the VISN 3 Conference: A Novel Approach to Attendee Introductions

A primary purpose of IE conferences is to meet and network with colleagues, but how can you get the process going when many people don't know each other?

Barbara Chanko introduced a unique "ice-breaker" exercise at VISN 3's conference. At sign-in, each person received a postcard with one of four questions (see below) to ask someone they didn't know. People then recorded the answers from their "buddies," and returned the cards to the registration table.

"This was a chance for people to mix," Ms. Chanko explained, "Otherwise they would stay with their own groups." During the course of the day, Ms. Chanko read the responses to the whole group as a way to have participants get to know each other and to fill in gaps between sessions. Attendees were surprised to discover that the questions were different!

Postcard #1:

- Welcome! Please circulate around the room and introduce yourself to someone you don't know. Learn where they are from, and what role(s) they play in IE.

Postcard #2:

- Welcome! Please circulate around the room and introduce yourself to someone you don't know. Ask them for two things that are keeping them from doing more in their IE role.

Postcard #3:

- Welcome! Please circulate around the room and introduce yourself to someone you don't know. Learn about what draws them to "do ethics" and IntegratedEthics.

Postcard #4:

- Welcome! Please circulate around the room and introduce yourself to someone you don't know. Ask them what they do for fun when they are not doing ethics.

Conference Dates, Places and Agendas

VISN 3: IntegratedEthics Education Day

April 30, 2009, James J. Peters VA Medical Center, Bronx, NY (live conference)

Welcome and Introductions
State of IE in VHA
State of IE in VISN 3
Knowledge and Skill-Building Sessions:

- Ethical Leadership

- Preventive Ethics

- Ethics Consultation

The Interplay Between Law and Ethics in Health Care (Presenters: attorneys from Regional Counsel)
Function/Facility Development Breakout Sessions:

- Ethical Leadership

- Preventive Ethics

- Ethics Consultation

Facility Team Meetings
Report Back/Immediate Next Steps
Wrap-up/Evaluations

Conference Dates, Places and Agendas

VISN 18:
Ethics Consultation Coordinators/Preventive Ethics Council Learning Collaboratives:

May 20, 2009, Albuquerque at VA, (live conference)

Ethics Consultation Topics	Preventive Ethics Topics
Session 1: • Introductions and orientation • Ethical theory and decision-making for ethics consultants (Dr. Geppert) • Mediation for Ethics Consultants • Ethical Issues in Pandemic Influenza (Dr. Geppert)	Session 1: • Introductions and orientation • Brief review of Preventive Ethics • Role of the Preventive Ethics Coordinator • Review of PE tools • Review of a model storyboard
Session 2: • Values-based government and business ethics workshop • Case analysis and discussion (EC group) • VISN 18 ECC collaboration and VISN proficiency improvement plan	Session 2: • Presentation of work-in-progress ISSUES cycles related to the results of the IESS facility survey by each PE Coordinator • Work in progress on the second ISSUES cycle to meet FY09 Performance Measure (time permitting)

Conference Dates, Places and Agendas

VISN 23:

IntegratedEthics Face-to-Face Conference

June 24-25, 2009, Minneapolis, EES Auditorium in VISN office (live conference)

Day 1
Welcome and Introductions
Acting Network Director Briefing
Plenary Session: Enhancing the Ethics Culture in VISN 23: IE Program Integration and Ethical Leadership Development:

- Overview of IE concepts and essential elements of program activities

- VISN 23 IESS results and ethics culture impact of EL and IE program

Activity #1: Bridging the theoretical and practical

- EL skills in daily management

Activity #2: Activities to routinely and systematically incorporate EL concepts into operations and management
Wrap-up

Day 2
IE Council Development/Enhancement
Essential activities of the IE Council
Interaction between IE functions
Linking IE Council to the ethics culture

Breakout Sessions:
1. Ethical Leadership Coordinators/Program Officers:

- Program management

- Program integration

- IEPO and IE leadership role

- Challenges/successes

2. Ethics Consultation

- Case study review

- Facility education plan

- VISN 23 education plan

- ECWeb/ECWeb reports

3. Preventive Ethics

- Brief overview

- Role of PE Coordinator

- Review of PE tools

- Review of a model storyboard

- Review of individual facility storyboards

Report from Breakout Sessions
VISN 23 Program Status
Wrap-up/Evaluations