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Case Study: Using the Hartman Value Profile Tool to embed values and behaviours

Following the Francis Report, it was highlighted that improving the values and behaviours of NHS staff could have a positive impact upon patient care. As such there has been an outward focus recently on how other organisations have recruited for and nurtured such values within new and existing staff.

Memorial Hermann Health System is one of the largest healthcare systems in the United States, and has been embedding values and behaviours over the last 25 years using the Hartman Value Profile (HVP) tool. This has led to very positive results around employee retention and engagement, both of which have been shown to have a direct impact upon patient care and experience. Originally this tool was used as a way of measuring the values of existing staff in order to determine which values the organisation would like to recruit for. However over the years use of the tool has evolved. Now as well as recruitment it is being used to help coordinate roles within senior management teams, and is becoming increasingly useful in helping to performance-manage existing staff.

Key Outcomes

- Over the past 25 years there have been year-on-year increases in staff retention, rising most recently from 80% in 2006 to almost 89% in 2013 as the organisation has been able to recruit and keep staff who are fitted to its culture. This has led to lower turnover, particularly within the first six months of employment. Retention in the first 90 days of employment is currently at 96.5%.
- Staff engagement is something that has only been measured in recent years, but this too has shown steady increases, improving significantly from a score of 3.8 out of 5 in 2001 to 4.3 in 2013. Engagement is particularly high within the nursing workforce with the average score being 4.21.
- The tool has also improved managers' ability to lead, by helping them to understand their own values and in turn where their strengths and weaknesses lie. As a result people have moved departments or undertaken slightly different roles, in order to gain better job satisfaction and to improve their fit within the organisation.

Background

Memorial Hermann is a not-for-profit healthcare system based in Houston, Texas; it is one of the largest providers in the United States, and one of the biggest employers in the city, having 5,550 physicians and 26,000 employees in total. The organisation was founded as a hospital in the 1900s but since then has evolved into an integrated healthcare system with eleven acute care hospitals, a rehabilitation unit and a children's hospital. Integration between physicians, clinicians and ambulatory services allows the organisation to cover the whole spectrum of healthcare.

With this tool Memorial Hermann aims to:

- Identify the right values and put in place specific processes to recruit the right staff for this particular organisation
- Foster a culture in which all staff are focused upon high levels of service, quality and safety
- Support problem-solving amongst staff at every level
- Improve the engagement levels of existing staff
- Enable deeper conversations to take place
- Create a positive and nurturing culture where people are able to develop to their full potential
- Help create a strong brand for Memorial Hermann based on its core values

Key Stages of Set-Up

- The HVP tool was first used at Memorial Hermann in 1992 when it was rolled out to improve the organisation's culture.
- Senior leaders were asked to use the tool themselves first so that they were better able to understand how it worked. This helped them to see the value of the tool and to overcome any scepticism.
- They were then trained on how to use it to recruit and performance-manage staff, as well as to help with their own personal development.
- Once all leaders were trained the tool was then rolled out to all of the organisation's existing staff, which at that time was around 18,000 employees. This was done online, which made it easier to reach a wide number of people at once.
- To ascertain what values Memorial Hermann would like to recruit for, the organisation looked at the value profiles of those existing employees who were successful in their roles and positively acknowledged by patients. The values which they demonstrated most strongly were then used as the benchmark for new and existing staff.
- Over the years, as the organisation's culture has transformed, those staff who have the desired values and behaviours remain, however those who don't tend to leave, which has served to further strengthen the culture.
- As employees have developed or changed roles within the organisation they have gone back and taken the test again. This often shows that they have developed more of the values and behaviours sought by the organisation.
- When there have been leadership changes at the top or other major changes then use of the tool has been useful in highlighting whether people feel stressed. This is apparent when results show people becoming more internally focused.

How It Works

The Hartman Value Profile tool, developed by Robert S. Hartman PhD and Mario Cardenas Trigos MD, measures a person's capacity to make value judgements. Part one consists of a list of 18 phrases pertaining to the external world and part two consists of 18 quotations related to self. To complete the HVP, a person is asked to rank the items in part one from best to worst with respect to what they value as "good", and those in part two from 'most agree' to 'least agree'. The results reflect an individual's own preferences based on their unique value system, which are measured against an objective scale. Measurement is very precise, yet practically it allows for an almost infinite variety. Results are derived from logical mathematical norms, and they are not based on the values of any specific population or group. It is not a "test" to be passed or failed; and the results have no bias with respect to sex, age, race, creed, or any other socio-cultural classification. Honesty is the best criterion for obtaining accurate results. The tool is not job-related, but value-related, so it can be used by every member of staff within an organisation regardless of occupation.

Recruitment

The HVP is not used as a screening tool as such, but as way of helping interview panels to reach a decision between several potentially appointable applicants. It is unique in that it helps to ascertain specific details such as 'can this person deal with stress' or 'would they fit within this complex environment', which is much deeper than a general employment screening tool. Interview questions are provided with the HVP results that help managers further explore a candidate's characteristics in an interview. Sometimes however HVP results come back so different to those results which are being sought that the applicant either has very misaligned values or did not fill out the tool correctly. This in itself gives an indication of their capacity to follow instructions and identify what is relevant in complex situations. Such applicants may not progress further within the recruitment process.

Although everyone takes the same survey, regardless of what role they are applying for, it is possible to focus on those traits which are most important for their role when analysing results. For example, if someone is applying for a leadership role then their values around strategic planning skills might be more relevant to examine.

Also, if someone is appointed, but then leaves or is terminated due to misconduct within the first 90 days, the recruiting manager can go back and review the HVP results in order to figure out if something was missed in the recruitment process. This allows managers to learn from their experiences and to refine the process in future.

Values → Beliefs → Behaviours
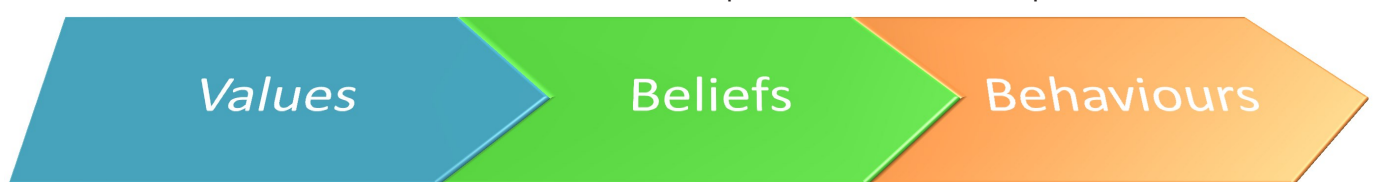
Performance management

At present employees only tend to take the HVP profile when they are first recruited or when they move into new roles. However some leaders are now asking their teams to take the profile more regularly, in order to determine how they are developing and whether they need any support. Results from the HVP can then be used to inform appraisal questions and to tease out responses in specific areas.

"One of our team leaders recently scored low in regards to job contentment. During her appraisal I made her aware of this and asked how she was feeling about her current role. It turned out that she felt that she had gone as far as she was able in her job and that she needed a new challenge, not that she actually disliked what she was doing. This allowed us to discuss other opportunities which led to her moving departments. She is now much happier and doing well in her new role." - Victoria King, Chief Nursing Officer, Memorial Hermann

The HVP places people within 13 stages/types according to the current relative strength among their people/relationship judgement, their task/process judgment and their strategic/big-picture judgement. Understanding where they are within their development allows their manager to support them in their further development so that they can improve their performance and leadership effectiveness.

Team Development

The HVP tool can also be used to ascertain whether teams are lacking key attributes so that new people can be recruited to specifically fill these roles. Furthermore, it can be used to move people around within a team so that their values and behaviours are better suited to their roles.

"We used the tool within our senior nursing team and it showed that we had lots of controllers but no-one with great listening skills or the ability to delegate. Therefore when we recruited new leaders we looked for those skills specifically" - Victoria King, Chief Nursing Officer, Memorial Hermann

Memorial Hermann Values

Memorial Hermann aims to recruit staff who will be:

- Able to problem solve and work in complex environments
- Respectful of the work environment
- Positive even under pressure
- Customer focused

Benefits of the Tool

- Unbiased
- Objective as based on data and not subjective
- Does not invade privacy
- Does not discriminate across socio-economic, race or gender divides
- Has been validated in a business environment
- Measures levels of good judgement, including decision-making and problem solving capability

- Reviewed and qualified by academic institutions
- Can be used with any member of staff from housekeepers to physicians
- Online and easily accessible

Resources

Access for using the HVP Standard Version - Byrum Method, on a per-profile or annual user's fee basis is available, along with HVP reports, training, consulting and coaching. To find out more contact Solutions@valuepartnersconsulting.com or go to www.valuepartnersconsulting.com

Key Challenges

Getting everyone to understand and accept the tool has been difficult in the past because there was a degree of scepticism amongst staff and leaders alike. This is not a typical intelligence test, psychological profile or personality assessment and it can be hard to understand how just giving your response to phrases can demonstrate your values, or how complex mathematical calculations can lead to clear results. However this was overcome by letting people experience it first-hand, by giving them guidance on how to competently interpret the results and by simplifying the reports that are issued. People now receive a one page summary that just gives the scores and the key parameters which makes it easier to see at a glance whether someone falls outside of the set limits and makes the results easier to interpret.

Key Learning

- It is important to trust the tool for what it is, and to be open and receptive to using it.
- People need to experience it first-hand because when it identifies who they are so clearly this helps them to overcome any initial scepticism

Sustainability

The Hartman Value Profile has been used within Memorial Herman for nearly a quarter of a century. In this time it has become firmly embedded within the culture as a tool for recruitment, performance management, and team alignment. As it has become such a cornerstone of the organisation, it could be easy to take it a little for granted. Therefore, it is important to explain its uses and benefits to new leaders so that they understand its purpose and what it is capable of achieving, in order to ensure its sustainability.

Next Steps

Memorial Herman is keen to look at how the tool can be developed further. As such Victoria King, the organisation's Chief Nursing officer is planning to explore how it can be used to help align management teams, and is going to have her entire leadership team take the HVP again going into this next fiscal year in order to move people into the best roles.

It is an on-going living breathing document that can continually be updated and reviewed, thus allowing it to be used by individuals as a development tool. It is therefore intended that the HVP will be used more in this way, as well as a recruitment and team-building tool.

Supporting Material

The following resources are available as an appendix to this case study:

- Appendix 1 – Outline of HVP questions
- Appendix 2 – Sample Test Result
- Appexdix 3 - Sample Basic Information/Selection Report
- Appendix 4 – Tailored interview questions based on specific results

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Lynn Clark was originally the assistant vice-president of employee relations at Memorial Hermann when the tool was first implemented there. Upon retiring in 2008 Lynn joined his wife Darlene Clark in the consultancy firm which she had opened in 2001. Darlene had already incorporated use of the Hartman Value Profile with her clients and it continues to be used extensively by the firm today. Both Lynn and Darlene have many years of experience in using this tool, and are able to offer expert advice in terms of interpreting and applying the results.

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