

Instructions for the IntegratedEthics Program Officer

Your Role and Responsibilities

The aim of an IntegratedEthics program is to improve ethics quality by integrating three core functions: ethics consultation, preventive ethics, and ethical leadership. As the program officer for IntegratedEthics in your facility, you'll direct the day-to-day operations of the program. As the administrative officer for the IntegratedEthics Council (described above), you'll also work to ensure that the council fulfills its responsibilities. You're the key liaison between the IntegratedEthics Council and the Ethical Leadership Coordinator, who chairs the council and is ultimately responsible for the success of the IntegratedEthics program. You're also the key point of contact between your local program and your VISN's IntegratedEthics Point of Contact and with the National Center for Ethics in Health Care.

Broadly, your responsibilities require you to:

1. Demonstrate expertise in the IntegratedEthics model

This toolkit contains everything you'll need to ensure that you're up to speed as the IntegratedEthics Program Officer: an overview of IntegratedEthics; descriptions of your role and responsibilities and those of the IntegratedEthics Council and the coordinators of each of the three core functions; the IntegratedEthics timeline to help you organize tasks and activities; information about the IntegratedEthics global assessment tools (facility workbook and staff survey); and information about other IntegratedEthics resources, including communications materials, primers and video courses for each function, and online learning modules on ethics in health care.

2. Direct IntegratedEthics

As director of your facility's IntegratedEthics program and administrative officer of the IntegratedEthics Council you'll oversee the council's core activities and achievement of performance goals. You'll serve as a spokesperson for the program, answering questions about it and about the ethics consultation, preventive ethics, and ethical leadership functions. You'll triage requests for assistance or guidance, assign them to the appropriate function, and be a resource to the functions as they carry out their activities. You'll assist the Ethical Leadership Coordinator in establishing the IntegratedEthics Council.

In your role as administrative officer of the IntegratedEthics Council, you'll assist the chair in managing the work of the council and ensuring that the council carries out all its assigned functions.

3. Build visibility and support for IntegratedEthics

You'll be responsible for creating awareness of and support for IntegratedEthics throughout the facility. As a visible leader of IntegratedEthics, you'll give presentations about IntegratedEthics to leaders and staff at all levels in the organization. You'll need to work closely with the function coordinators to understand their needs and advocate for resources, such as dedicated time, educational materials, or workspace, to enable each function to succeed.

4. Ensure integration

You'll be responsible for building on existing strengths to ensure that operations of the three core functions of your IntegratedEthics program are well integrated. Through the council and other channels you'll also establish effective communication mechanisms and relationships between the IntegratedEthics program and other programs, offices, and leaders throughout the facility.

5. Monitor performance

As manager of the IntegratedEthics program and administrative officer of the IntegratedEthics Council, you're responsible for monitoring the performance of the program, including achievement of implementation goals and completion of program assessments, such as the IntegratedEthics Facility Workbook and Staff Survey (Tab 7). You'll report achievement of performance goals to your VISN IntegratedEthics Point of Contact.

6. Ensure quality

You'll ensure that the IntegratedEthics Council has a plan for evaluating and continuously improving the overall quality and effectiveness of the IntegratedEthics program, including all three functions, using the various IntegratedEthics assessment tools in this toolkit (Tab 7).

7. Network externally

You'll be the primary liaison for your facility to the VISN IntegratedEthics Point of Contact and to the National Center for Ethics in Health Care. In this role you'll provide information about your program's achievement of required implementation steps. You'll also share information about your program's activities, best practices, and lessons learned with facilities in your VISN and throughout VHA.

On the following pages, you'll find a timeline and brief descriptions of the specific tasks associated with your responsibilities and those of the coordinators of each of the core functions of IntegratedEthics. All of these tasks should be completed during the initial implementation phase; thereafter, many of the activities will need to be repeated periodically and/or maintained.

Timeline

IntegratedEthics Program Officer	Mo 1	Mo 2	Mo 3	Mo 4	Mo 5	Mo 6	Mo 7	Mo 8	Mo 9	Mo 10	Mo 11	Mo 12
Get Started												
Read IE toolkit and primers (M 1)												
Meet with coordinators (M 1)												
Engage with VISN IE community (M 1)												
Complete EC, PE, and EL video courses (M 2 & 3)												
Develop IE Council (M 2 & 3)												
Plan and implement IE communications strategy (M 3)												
Engage with the National IE Community												
Register with the national IntegratedEthics website (M 1)												
Participate in IE teleconferences (M 3 thru 12)												
Understand Your Current Ethics Program												
Develop a plan to complete IE Facility Workbook (M 2)												
Coordinate completion of IE Facility Workbook (M 2 & 3)												
Review results of IE Facility Workbook (M 4)												
Coordinate IE Council Activities												
Help educate IE Council and facility leadership (M 2 thru 5)												
Help organize EC, PE, and EL functions (M 3 thru 7)												
Roll out IntegratedEthics online courses (M 4)												
Plan development of IE policy (M 12)												
Coordinate Ongoing Activities												
Establish regular communication with the VISN POC (M 4 thru 12)												
Provide support as needed to PE, EC, and EL (M 7 thru 12)												
Survey Your Staff												
Develop Plan to Administer IE Staff Survey (M 3 & 4)												
Administer IE Staff Survey (M 5)												
Publicize results of IE Staff Survey (M 7)												
Develop strategic response to survey results (M 7 & 8)												

Description of Tasks

Get Started

Read IE toolkit and primers. Reading the introduction to IntegratedEthics (Tab 1) and the IntegratedEthics communications materials (Tab 4) is an important first step to ensure that you understand the broad concepts and aims of IntegratedEthics. It's also crucial to read each of the three primers carefully—*Ethics Consultation: Responding to Ethics Questions in Health Care*; *Preventive Ethics: Addressing Ethics Quality Gaps on a Systems Level*; and *Ethical Leadership: Fostering an Ethical Environment & Culture*. You'll return to these documents frequently as you coordinate and support the launch of IntegratedEthics at your facility.

Meet with coordinators. You should meet with the coordinators responsible for each of the functions to provide guidance and answer questions. You may want to establish a routine meeting schedule, or you may prefer to get periodic updates through other means. The important aspect of this task is to open the dialogue and build good working relationships with the individuals who are most important to the program's success.

Engage with VISN IE community. The VISN IntegratedEthics Point of Contact will help to establish mechanisms for facilities in the VISN to share information, ideas, and support with one another. For example, he or she may hold regular conference calls. To facilitate this, you should provide your VISN point of contact with the names of the individuals designated as the coordinators for each function.

Complete EC, PE, and EL video courses. Once you've read the primers you should complete all three video courses. These courses walk you through important aspects of each function.

Develop IE Council. Working with the Ethical Leadership Coordinator and the other function coordinators as appropriate, you should develop a list of potential candidates to participate in the council. You should also plan the first council meeting to kick off the council's work and educate members about IntegratedEthics, the overall work of the council, and their responsibilities as council members.

Plan and implement IE communications strategy. Awareness about IntegratedEthics among staff is critical. You should develop a plan for communicating about the program with all facility employees. Some sites have found success in identifying new individuals to participate in their council through a strong communications strategy and an open call for participation. You may want to distribute some of the communications materials provided in this toolkit directly to employees throughout the facility, or use the content in standing publications, such as newsletters, letters from the director, and other communications. It's your responsibility to keep the lines of communication open through periodic updates on program activities and successes.

Engage with the National IE Community

Register with the national IntegratedEthics website. The IntegratedEthics website (vaww.ethics.va.gov/IntegratedEthics) is designed to support continuous learning among VA's IntegratedEthics community. The site contains all the materials in the IntegratedEthics toolkits (including the video courses), links to online learning modules, and many other resources and tools. It will be updated regularly.

Participate in IE teleconferences. These conference calls provide a forum for facilities to solve problems and seek assistance in implementing IntegratedEthics. Ethics Center staff will moderate the teleconferences and focus on the needs of the attendees. The content of the calls may include discussing common problems, sharing best practices, or a question-and-answer session with a content expert.

Understand Your Current Ethics Program

Develop a plan to complete IE Facility Workbook. As the IntegratedEthics Program Officer, you're responsible for supporting the council to ensure completion of the IntegratedEthics Facility Workbook. This tool is intended to help you identify gaps in your facility's current ethics program. To begin, you should determine who should be involved in completing each section of the workbook. You should then establish clear expectations and timelines. Refer to the facility workbook instructions for further details (Tab 7).

Coordinate completion of the IE Facility Workbook. Once the IntegratedEthics Council develops a plan, you'll need to follow up to ensure that the plan is implemented. Completing the workbook is not as easy as it may seem. The people who take on this responsibility will need your assistance and encouragement.

Review results of the IE Facility Workbook. The IntegratedEthics Facility Workbook will help to identify gaps in ethics quality. You should compile information about these gaps and share them with the IntegratedEthics Council. The council members, especially the Preventive Ethics Coordinator, should target specific activities to respond to the issues and concerns identified through the workbook process.

Coordinate IE Council Activities

Help educate IE Council and facility leadership. Your role is to monitor and coordinate these activities, providing assistance when needed. You may want to consider holding a retreat for everyone involved in the IntegratedEthics program, including key leaders, function coordinators, and other council members, to educate them about IntegratedEthics and plan how the council will fulfill its responsibilities.

Help organize the EC, PE, and EL functions. As IntegratedEthics Program Officer, your primary role is to oversee the three core functions, coordinate their activities, and assist them in completing their tasks. You'll want to meet with the function coordinators, the ethics consultation service, and the preventive ethics team to help them plan how they'll fulfill their new responsibilities.

Roll out the IntegratedEthics online learning modules. You should make sure that your IntegratedEthics Council has a plan to roll out the "Ethics in Health Care" module to all staff. In addition, the other IntegratedEthics online learning modules should be rolled out to staff for whom the subject matter is relevant. For example, the module "Shared Decision Making with Patients" is appropriate for clinical staff, while the module "Ethical Practices in Business and Management" (expected in early FY08) will be appropriate for staff with business and management responsibilities.

Plan development of IE policy. Your role is to support the council as it develops policy for the new IntegratedEthics program and ensure that it is implemented. You'll also support the work of the council (or appropriate subcommittees) in updating other local ethics-related policies, such as informed consent for clinical treatments and procedures, advance directives, or end-of-life care.

Coordinate Ongoing Activities

Establish regular communication with the VISN POC. Following the schedule set by your VISN point of contact, you should report on the status of performance monitors and progress toward local rollout of IntegratedEthics. You should also begin to share information and experiences with other facilities in your VISN.

Provide support as needed to PE, EC, and EL. Continue to track the activities of the core functions and council and troubleshoot as appropriate.

Survey Your Staff

Develop plan to administer IE Staff Survey. The survey will help you assess your facility's ethical environment and culture and its ethics practices. All employees will take the survey, but some will complete only portions of it, depending on their work category.

Administer IE Staff Survey. You're responsible for managing the logistics of implementing the IntegratedEthics Staff Survey. Leadership should encourage staff members to complete the survey; the Ethics Center will distribute the materials you need for marketing and data collection. Once data have been collected, you'll be able to access an online report highlighting areas in which employees perceived that your facility is doing well and those in which they perceive that improvement may be needed. A guide to help you understand the report will be available through the Ethics Center. You'll review the results with the council and help the council interpret the report in your local facility's context. You'll then consider what steps you might take to improve ethical practices.

Publicize results of IE Staff Survey. Publicizing the results of the survey is essential to demonstrate to staff members that their participation was both important and appreciated. Broadly publicizing the results can also help to generate awareness and demonstrate the importance of your IntegratedEthics program.

Develop strategic response to staff survey results. Once the IntegratedEthics Staff Survey results have been received, you'll review them with the council. Next, you should ensure that the council develops a strategy to respond to the findings. The IntegratedEthics functions, particularly preventive ethics, should target improvement initiatives to the issues and concerns identified through the survey process. You should work with the function coordinators, especially the Preventive Ethics Coordinator, to set priorities and monitor progress.

Instructions for the Ethical Leadership Coordinator

Your Role and Responsibilities

The aim of ethical leadership is to foster an ethical environment and culture. As a senior leader in your facility and the chair of the IntegratedEthics Council, you're responsible for the overall success of IntegratedEthics in your facility and for ensuring that the council fulfills its responsibilities (described above).

As coordinator of the ethical leadership function, your immediate charge is to provide education on ethical leadership to leaders throughout the organization. They should understand their role and responsibilities in creating and sustaining an ethical environment at your facility. You'll act as a role model for them and, through the use of the IntegratedEthics tools, help them learn to foster an ethical environment and culture.

Broadly, your responsibilities require you to:

1. Demonstrate expertise in the IntegratedEthics model

This Ethical Leadership Toolkit contains everything you need to ensure that you're up to speed: an overview of IntegratedEthics; descriptions of your role and responsibilities as coordinator of the ethical leadership function as well as a description of the responsibilities of the IntegratedEthics Council; the IntegratedEthics timeline to help you organize tasks and activities; the ethical leadership video course; and self-assessment tools to help individual leaders understand how their actions affect the organization's ethical environment and ethics practices and to identify opportunities for improvement. The toolkit also provides communications materials and information about online learning modules on ethics in health care.

2. Lead your facility's IntegratedEthics program

You are the leader and champion of the IntegratedEthics program in your facility. Your role is to visibly support the IntegratedEthics Program Officer and IntegratedEthics Council in developing the program and to champion the goals of IntegratedEthics with all employees. You also have responsibility for creating understanding of and support for ethical leadership concepts among leaders in your facility. You'll be directing their efforts to improve ethical decision-making practices. In support of this effort, you'll ensure that IntegratedEthics assessment tools (facility workbook, staff survey, leadership self-assessment tool) are used at your facility. And you'll establish both a personal plan and a facility plan to respond to the results of these assessments.

3. Ensure integration

The IntegratedEthics Council is the principal means by which to integrate the various ethics activities within your facility. As chair of the council, you'll be responsible for its success. In addition, you'll act as a liaison with leaders outside the council to help them understand the activities and outcomes of the IntegratedEthics program, recognize its value, and support it. You're also responsible for ensuring communication between the IntegratedEthics Council and other leadership committees. As appropriate, you (or your designee) may also act as the representative for ethics on key facility governance committees.

4. Monitor performance

As the individual with overall responsibility for the success of IntegratedEthics in your facility, it's your job to ensure that your facility achieves the program's implementation goals and completes assessment tools—you'll report performance monitors to VISN leadership. You're also responsible for monitoring whether action is taken on findings from the facility workbook and staff survey and whether appropriate progress is made toward implementing IntegratedEthics effectively.

5. Network externally

Along with the IntegratedEthics Program Officer, you'll share information about your function's activities, best practices, and lessons learned through a series of national teleconferences and other forums.

On the following pages, you'll find a timeline and brief descriptions of the specific tasks associated with your responsibilities and those of the program officer and coordinators of the other core functions of IntegratedEthics. All of these tasks should be completed during the initial implementation phase; thereafter, many of the activities will need to be repeated periodically and/or maintained.

Timeline

Ethical Leadership Coordinator	Mo 1	Mo 2	Mo 3	Mo 4	Mo 5	Mo 6	Mo 7	Mo 8	Mo 9	Mo 10	Mo 11	Mo 12
Educate Yourself												
Read EL toolkit and review primer (M 1)												
Complete EL video course (M 2)												
Engage with the VISN IE community (M 1)												
Develop IE Council (M 2 & 3)												
Engage with the National IE Community												
Register with the national IntegratedEthics website (M 1)												
Participate in IE teleconferences (M 3 thru 12)												
Understand Your Current Ethics Program												
Support completion of IE Facility Workbook (M 2 & 3)												
Prioritize results of IE Facility Workbook (M 4)												
Initiate ethical leadership QI from the workbook (M 4 & 5)												
Organize the EL Function												
Identify leaders (M 2 & 3)												
Generate buy in from leaders (M 2 & 3)												
Establish monitoring of ongoing EL functions (M 7 thru 12)												
Educate Leaders												
Distribute IE communications materials (M 3 & 4)												
Arrange to show EL video course (M 3 thru 5)												
Distribute EL primer (M 3 thru 5)												
Support the Staff Survey												
Support administration of IE Staff Survey (M 5)												
Prioritize results of IE Staff Survey (M 6 thru 12)												
Initiate ethical leadership QI from the IE Staff Survey (M 9 thru 12)												
Build Capacity in Systematic Ethical Decision Making												
Analyze ethical decision-making practices (M 7 & 8)												
Enhance facility decision-making practices (M 9 thru 12)												

Description of Tasks

Educate Yourself

Read EL toolkit and review primer. Reading the introduction to IntegratedEthics (Tab 1) and IntegratedEthics communications materials (Tab 4) is an important step to ensure that you understand the broad concepts and aims of IntegratedEthics. You'll also want to review the ethical leadership primer, *Ethical Leadership: Fostering an Ethical Environment & Culture*, which lays out specific behaviors leaders should use to foster an organizational environment and culture that is conducive to ethical practice. You'll return to this document frequently as you implement and refine the ethical leadership function in your facility.

Complete EL video course. Once you've reviewed the ethical leadership primer, you'll benefit from the ethical leadership video course. As part of this course, you should complete the leadership self-assessment tool and establish a personal action plan based on the results.

Engage with the VISN IE community. Integration is essential at both the facility and VISN level. Through the VISN IntegratedEthics Point of Contact, you and the IntegratedEthics Program Officer will connect with other ethics programs in your VISN in order to share your experiences and ideas about program implementation. You'll also report to your VISN about achievement of IntegratedEthics performance monitors.

Develop the IE Council. Leadership support is essential to the development of an effective IntegratedEthics Council. With the IntegratedEthics Program Officer serving as your administrative officer, you'll chair the council and lead its activities. Together, you'll identify individuals to serve on the council and work to establish effective communication mechanisms and relationships between the IntegratedEthics program and other programs, offices, and leaders throughout the facility.

Engage with the National IE Community

Register with the national IntegratedEthics website. The IntegratedEthics website (vaww.ethics.va.gov/IntegratedEthics) is designed to support continuous learning among VA's IntegratedEthics community. The site contains all the materials in the IntegratedEthics toolkits (including the video courses), links to online learning modules, and many other resources and tools. It will be updated regularly.

Participate in IE teleconferences. These conference calls provide a forum for facilities to solve problems and share solutions in implementing IntegratedEthics. Ethics Center staff will moderate the teleconferences and focus on the needs of the attendees. The content of the calls may include discussing common problems, sharing best practices, or a question-and-answer session with a content expert. You should ensure that appropriate staff at your facility is participating in these calls.

Understand Your Current Ethics Program

Support completion of the IE Facility Workbook. The IntegratedEthics Facility Workbook is intended to help identify gaps in your facility's current ethics program. The IntegratedEthics Program Officer and IntegratedEthics Council are responsible

for completion of the workbook. As the chair of the council, you'll provide assistance and encouragement to ensure the workbook is completed, in particular by providing information needed for the ethical leadership portion of the tool.

Prioritize results of IE Facility Workbook. The IntegratedEthics Program Officer and IntegratedEthics Council will compile information about the gaps in ethics quality that were identified through the workbook. Your responsibility is to help them to prioritize the developmental needs at your facility and guide them in producing and implementing an appropriate corrective action plan.

Initiate ethical leadership QI from the workbook. As the function coordinator, you'll critically review the results from the ethical leadership section of the workbook and plan next steps to enhance ethical leadership in your facility.

Organize the EL Function

Identify leaders. As coordinator of the ethical leadership function, you'll model the IntegratedEthics program for the leaders throughout your facility—that is, employees at the senior executive, and mid-manager levels. As a first step, identify leaders in these categories.

Generate buy in from leaders. To accomplish this, you should communicate directly with the leaders you've identified, preferably at a face-to-face meeting. You should express support for the IntegratedEthics initiative, emphasize the importance of ethical leadership in fostering an ethical environment and organizational culture, explain the role you'll play in coordinating the ethical leadership function, and ask leaders to support the program overall and to complete the ethical leadership video course and self-assessment tool.

Establish monitoring of ongoing EL functions. Through the IntegratedEthics Council, you will develop program goals, establish monitoring mechanisms, and obtain regular updates about council activities and IntegratedEthics functions. You should offer assistance and mid-course corrections to the program as needed.

Educate Leaders

Distribute IE communications materials. You should ensure that all the leaders you've identified receive and read the introduction to IntegratedEthics and the IntegratedEthics communications materials contained in your toolkit to familiarize themselves with the concepts and aims of IntegratedEthics.

Arrange to show EL video course. You may want to delegate the task of ethical leadership education to the IntegratedEthics Program Officer or the IntegratedEthics Council. You should be sure to actively support the education efforts by encouraging leaders in your facility to attend showings of the ethical leadership video. Consider devoting a segment of a scheduled leadership retreat or a regularly scheduled leadership meeting—such as the “director's weekly meeting”—to the video. Or you might schedule several showings for smaller groups to stimulate lively discussion. After showing the video, you or your delegate should distribute the Ethical Leadership Self-Assessment Tool. (See the training checklist for details.) You'll need to keep track of who completed the course and when; follow facility procedures to ensure that participants receive education credits for completing the course.

Distribute EL primer. After they complete the video course, leaders should review the leadership primer, *Ethical Leadership: Fostering an Ethical Environment & Culture*. This document expands on the material covered in the video course and provides additional information and tools for leaders.

Support the Staff Survey

Support administration of IE Staff Survey. The IntegratedEthics Council is responsible for planning and monitoring the administration of the survey. Your responsibility is to assist them in identifying needed resources and encouraging staff members to complete the survey.

Prioritize results of IE Staff Survey. The IntegratedEthics Council will compile information about the gaps in ethics quality that were identified through the IntegratedEthics Staff Survey. Your responsibility is to help the council—and especially the Preventive Ethics Coordinator—prioritize the issues and concerns identified through the survey process and target quality improvement initiatives to address them.

Initiate ethical leadership QI from the IE Staff Survey. Critically review the results from the IntegratedEthics Staff Survey and identify which, if any, results may require action relating to ethical leadership. Develop an appropriate action plan.

Build Capacity in Systematic Ethical Decision Making

Analyze ethical decision-making practices. To improve leadership decision making at your facility, you must first understand how it is occurring now. Begin by analyzing local decision-making practices to identify whether leadership decisions typically reflect the six key attributes of ethical decision making, such as being values-based. (For more information about the attributes of ethical decision making, see the leadership primer.) You'll want to look at formal processes—for example, whether the attributes are regularly considered and documented in local executive decision memoranda (EDMs) and whether your executive leadership council systematically identifies ethical issues relevant to management decisions or regularly seeks input from the ethics consultation service. You'll also want to examine informal processes, such as whether the environment is conducive to staff bringing up ethical issues during management discussions and whether someone is designated to identify and call attention to potential ethical problems.

Enhance facility decision-making practices. Once you've gained a thorough understanding of local leadership decision-making practices you should propose changes to reflect the six attributes of ethical decision making. Whether decisions are made by an individual leader, an informal leadership team, or a formal leadership board, they should be made in a systematic fashion and should reflect the key ethical attributes. You may find the sample models for ethical decision making included in this toolkit (Tab 6) helpful. Changing the behavior of individuals and groups takes time and practice. Achieve small successes early and continue to build on these over time to reach your final goal of reflecting all six attributes of ethical decision making in your local processes.

Instructions for the Ethics Consultation Coordinator

Your Role and Responsibilities

The aim of ethics consultation in health care is to help patients, staff, and other parties resolve ethical concerns. As coordinator of the ethics consultation function in your facility, your role is to ensure consistency and quality in your ethics consultation approach. You're also a core member of the facility's IntegratedEthics Council. To fulfill these responsibilities, you must have not only the knowledge and skills required for ethics consultation, but also management skills.

Broadly, your responsibilities are to:

1. Demonstrate expertise in the IntegratedEthics approach to ethics consultation

This Ethics Consultation Toolkit contains everything you'll need to ensure that you're up to speed: an overview of IntegratedEthics; descriptions of your role and responsibilities as coordinator of the ethics consultation function as well as a description of the responsibilities of the IntegratedEthics Council; the IntegratedEthics timeline to help you organize tasks and activities; and the ethics consultation video course. The toolkit also provides communications materials, evaluation tools for the ethics consultation service, and information about online learning modules on ethics in health care.

2. Manage your ethics consultation service

As Ethics Consultation Coordinator you're responsible for overseeing the operation of your facility's consultation service. This includes organizing the service and ensuring that it has needed resources. You'll select ethics consultants and ensure that they are appropriately trained in the IntegratedEthics approach to consultation, as well as assess their proficiency and ensure that they engage in appropriate skills development. It's your job to see that consultants collaborate and work well together.

Your responsibilities also include implementing the ECWeb online database tool (see Tab 6 for description) for managing the consultation process in your facility, evaluating the quality of your consultation service, and overseeing ongoing quality improvement.

3. Ensure integration

The ethics consultation function should build on existing strengths and include mechanisms to achieve horizontal and vertical integration with other groups in the organization. In addition to participating in the IntegratedEthics Council, you'll need to establish relationships with stakeholders, including facility leaders, who may bring ethics questions to the service.

4. Build visibility and support for ethics consultation

You're responsible for creating awareness of and support for the ethics consultation function. This requires working closely with the IntegratedEthics Program Officer, who oversees communications about the IntegratedEthics program and its core functions throughout the facility.

5. Network externally

Along with the IntegratedEthics Program Officer, you'll share information about your function's activities, best practices, and lessons learned through a series of national teleconferences and other forums.

On the following pages, you'll find a timeline and brief descriptions of the specific tasks associated with your responsibilities and those of the coordinators of each of the core functions of IntegratedEthics. All of these tasks should be completed during the initial implementation phase; thereafter, many of the activities will need to be repeated periodically and/or maintained.

Timeline

Ethics Consultation Coordinator	Mo 1	Mo 2	Mo 3	Mo 4	Mo 5	Mo 6	Mo 7	Mo 8	Mo 9	Mo 10	Mo 11	Mo 12
Educate Yourself												
Read EC toolkit and review primer (M 1)												
Complete EC video course (M 1)												
Engage with the National IE Community												
Register with the national IntegratedEthics website (M 1)												
Participate in IE teleconferences (M 3 thru 12)												
Understand Your Current Ethics Program												
Contribute to completion of IE Facility Workbook (M 2 & 3)												
Organize the EC Function												
Organize the EC function (M 1 & 2)												
Identify members of EC function (M 1 & 2)												
Draft an EC policy (M 12)												
Train Ethics Consultants in the IE model and the CASES Approach												
Distribute IE communications materials (M 3)												
Distribute EC primer (M 3)												
Schedule and organize EC video course (M 4)												
Discuss EC results from IE Facility Workbook (M 5)												
Use the CASES Approach												
Implement ECWeb in your facility (M 4)												
Continuously improve your EC process (M 4 thru 12)												
Improve Ethics Consultants' Proficiency												
Assess and track EC proficiency (M 6 thru 7)												
Implement professional development plans (M 8 thru 12)												

Description of Tasks

Educate Yourself

Read EC toolkit and review primer. Reading the introduction to IntegratedEthics (Tab 1) and IntegratedEthics communications materials (Tab 4) is an important step to ensure that you understand the broad concepts and aims of IntegratedEthics. You'll also want to review the ethics consultation primer, *Ethics Consultation: Responding to Ethics Questions in Health Care*, which lays out the essential elements and success factors for this function. You'll return to this document time and again as you implement and refine the ethics consultation function in your facility.

Complete EC video course. Once you've reviewed the ethics consultation primer and the CASES approach, take the ethics consultation video course. The course walks you through the steps of CASES, using specific examples.

Engage with the National IE Community

Register with the national IntegratedEthics website. The IntegratedEthics website (www.ethics.va.gov/IntegratedEthics) is designed to support continuous learning among VA's IntegratedEthics community. The site contains all the materials in the IntegratedEthics toolkits (including the video courses), links to online learning modules, and many other resources and tools. It will be updated regularly.

Participate in IE teleconferences. These conference calls provide a forum for facilities to solve problems and share solutions in implementing IntegratedEthics. Ethics Center staff will moderate the teleconferences and focus on the needs of the attendees. The content of the calls may include discussing common problems, sharing best practices, or a question-and-answer session with a content expert.

Understand Your Current Ethics Program

Contribute to completion of IE Facility Workbook. The IntegratedEthics Program Officer is responsible for ensuring that the IntegratedEthics Facility Workbook is completed but may need your help collecting data. Specifically, you may be asked to assemble a team to complete the ethics consultation section of the workbook. You'll also review the results from the ethics consultation section and plan next steps to enhance ethics consultation in your facility.

Organize the EC Function

Organize the EC function. Once you have a handle on the IntegratedEthics approach to ethics consultation it's time to think about how you'll implement the three models for ethics consultation identified in the primer. Different models will be appropriate for different consultation requests and you'll want to understand how each model will work best in your facility. You'll also want to ensure that collectively your ethics consultants have appropriate expertise to work effectively in different models as the need arises.

Identify members of EC function. The ethics consultation function is only as effective as its ethics consultants, so choosing consultants is an important task. Review the list of your current ethics consultants and use the primer to help you decide whom to select for the IntegratedEthics consultation function. The goal is

for your ethics consultants to be proficient in the knowledge, skills, and character traits identified by the American Society for Bioethics and the Humanities in its *Core Competencies* report, which are discussed in the ethics consultation primer.

Draft an EC policy. The structure, function, and process of ethics consultation should be formalized in institutional policy. Your IntegratedEthics Council will develop overall policy for IntegratedEthics in your facility; you'll work with the council to draft the section governing consultation. Be sure to address all the topics outlined in the primer. The drafting process will help your team clarify and stay focused on your core mission. Don't wait for the final IntegratedEthics policy to begin implementing the guidance in the primer! Ethics consultants should begin using CASES as soon as they've read the primer and taken the video course, as described below.

Train Ethics Consultants in the IE model and the CASES Approach

Distribute IE communications materials. Ensure that members of the consultation service receive and read the introduction to IntegratedEthics (Tab 1) and communications materials (Tab 4) in this toolkit to familiarize themselves with the concepts and aims of IntegratedEthics.

Distribute EC primer. The success of ethics consultation hinges on well-informed ethics consultants. After you've educated yourself about the IntegratedEthics approach to ethics consultation and CASES, it's time to begin training your ethics consultants. All members of your ethics consultation service should carefully review the ethics consultation primer, *Ethics Consultation: Responding to Ethics Questions in Health Care*.

Schedule and organize EC video course. The ethics consultation video course is an excellent vehicle to promote team building and help educate members of your ethics consultation service about the IntegratedEthics approach to ethics consultation. See the training checklist for details. Keep track of who completes the course and when; follow facility procedures to ensure that consultants receive education credits for completing the course.

Discuss EC results from IE Facility Workbook. Discussing the ethics consultation section of the facility workbook will help you and your ethics consultation service to critically assess the service's activities and processes. The workbook will also help you to recognize what next steps you should take to improve ethics consultation in your facility.

Use the CASES Approach

Implement ECWeb in your facility. ECWeb is a secure, web-based database tool designed to reinforce sound ethics consultation practices, help ethics consultants manage consultation records, and support quality improvement activities. This tool walks consultants through the CASES process and enables them to document their consultation activities. To enroll your facility and get started using ECWeb, see the instructions on the IntegratedEthics website at vaww.ethics.va.gov/IntegratedEthics.

Continuously improve your EC process. Now that the members of your ethics consultation service have read the primer and completed the video course, and your facility has enrolled in ECWeb, you're ready to implement the IntegratedEthics approach to consultation, including using the CASES approach and ECWeb. Use

the ethics consultation primer as a reference as you proceed. As you complete each consultation, be sure to critically examine your consultation process so that you can continuously improve.

Improve Ethics Consultants' Proficiency

Assess and track EC proficiency. Consultants' proficiency is critical to the success of the ethics consultation function. You should administer the Ethics Consultant Proficiency Assessment Tool to each member of your ethics consultation service (including yourself) and use the Advanced Proficiency Tracking Log for your service as a whole. See the proficiency assessment tool instructions for details (Tab 6).

Implement professional development plans. You should address the knowledge and skill gaps in the consultation service identified through the proficiency assessment tool by designing individual professional development plans to ensure that consultants continuously develop their knowledge and skills.

Instructions for the Preventive Ethics Coordinator

Your Role and Responsibilities

The aim of preventive ethics in health care is to produce measurable improvements in ethics practices by implementing systems-level changes to reduce gaps in ethics quality. As coordinator of the preventive ethics function in your facility, your role is to lead efforts to improve health care quality by identifying, prioritizing, and addressing ethical issues on a systems level. You're also a core member of the facility's IntegratedEthics Council. To fulfill these responsibilities, you must have not only the knowledge and skills required for preventive ethics, but also management skills.

Broadly, your responsibilities require you to:

- 1. Demonstrate expertise in the IntegratedEthics approach to preventive ethics**

This Preventive Ethics Toolkit contains everything you need to ensure that you're up to speed: an overview of IntegratedEthics; descriptions of your role and responsibilities as coordinator of the preventive ethics function as well as a description of the responsibilities of the IntegratedEthics Council; the IntegratedEthics timeline to help you organize tasks and activities; and the preventive ethics video course. The toolkit also provides communications materials and information about online learning modules on ethics in health care.

- 2. Manage your facility's preventive ethics team**

As Preventive Ethics Coordinator you're responsible for overseeing your facility's preventive ethics function. This includes selecting members for the preventive ethics team, organizing the function, and ensuring that it has needed resources. You'll ensure that team members are appropriately trained in the IntegratedEthics approach to preventive ethics and implement it effectively. It's your job to see that team members collaborate and work well together.

Your responsibilities also include ensuring the quality of preventive ethics, using the resources provided in the primer, this toolkit, and other IntegratedEthics tools to evaluate the function, and overseeing ongoing quality improvement.

- 3. Ensure integration**

The preventive ethics function should build on existing strengths and include mechanisms to achieve horizontal and vertical integration with other groups in the organization. In addition to participating in the IntegratedEthics Council, you'll need to establish relationships with stakeholders, including facility leaders, who may help you to identify issues for the preventive ethics team to address or to address issues that others have identified.

- 4. Build visibility and support for preventive ethics**

You're responsible for creating awareness of and support for the preventive ethics function. This requires working closely with the IntegratedEthics Program Officer, who oversees communications about the IntegratedEthics program and its functions throughout the facility.

5. Network externally

Along with the IntegratedEthics Program Officer, you'll share information about your function's activities, best practices, and lessons learned through a series of national teleconferences and other forums.

On the following pages, you'll find a timeline and brief descriptions of the specific tasks associated with your responsibilities and those of the coordinators of each of the core functions of IntegratedEthics. All of these tasks should be completed during the initial implementation phase; thereafter, many of the activities will need to be repeated periodically and/or maintained.

Timeline

	Mo 1	Mo 2	Mo 3	Mo 4	Mo 5	Mo 6	Mo 7	Mo 8	Mo 9	Mo 10	Mo 11	Mo 12
Preventive Ethics Coordinator												
<i>Educate Yourself</i>												
Read PE toolkit and review primer (M 1)												
Complete PE video course (M 1)												
<i>Engage with the National IE Community</i>												
Register with the national IntegratedEthics website (M 1)												
Participate in IE teleconferences (M 3 thru 12)												
<i>Understand Your Current Ethics Program</i>												
Contribute to completion of IE Facility Workbook (M 2 & 3)												
Review IE Staff Survey results (M 9 thru 12)												
<i>Organize the PE Function</i>												
Organize the PE function (M 2 thru 4)												
Identify members of PE function (M 3 & 4)												
Draft a PE policy (M 12)												
<i>Educate PE Team</i>												
Distribute IE communications materials (M 4)												
Distribute PE primer (M 4)												
Schedule and organize PE video course (M 5)												
Discuss PE results from IE Facility Workbook (M 4 & 5)												
<i>Use the ISSUES Approach</i>												
Establish and maintain PE contacts (M 5 thru 12)												
Assemble list of issues (M 6)												
Begin your first ISSUES cycle (M 7 & 8)												
Continuously improve your PE process (M 7 thru 12)												

Description of Tasks

Educate Yourself

Read PE toolkit and review primer. Reading the introduction to IntegratedEthics (Tab 1) and IntegratedEthics communications materials (Tab 4) is an important step to ensure that you understand the broad concepts and aims of IntegratedEthics. You'll also want to review the preventive ethics primer, *Preventive Ethics: Addressing Ethics Quality Gaps on a Systems Level*, which lays out the essential elements and success factors for this function. You'll return to this document time and again as you implement and refine the preventive ethics function in your facility.

Complete PE video course. Once you've reviewed the preventive ethics primer and have an understanding of preventive ethics, you'll benefit from the preventive ethics video course. The course walks you through key steps in the ISSUES cycle, using a case example.

Engage with the National IE Community

Register with national IntegratedEthics website. The IntegratedEthics website (www.ethics.va.gov/IntegratedEthics) is designed to support continuous learning among VA's IntegratedEthics community. The site contains all the materials in the IntegratedEthics toolkits (including the video courses), links to online learning modules, and many other resources and tools. It will be updated regularly.

Participate in IE teleconferences. These conference calls provide a forum for facilities to solve problems in implementing IntegratedEthics. Ethics Center staff will moderate the teleconferences and focus on the needs of the attendees. The content of the calls may include discussing common problems, sharing best practices, or a question-and-answer session with a content expert.

Understand Your Current Ethics Program

Contribute to completion of IE Facility Workbook. The IntegratedEthics Program Officer is responsible for ensuring that the facility workbook is completed but may need your help collecting data. Specifically, you may be asked to assemble a team to complete the preventive ethics section of the workbook. You'll also review the results from the preventive ethics section and plan next steps to enhance preventive ethics in your facility.

Review IE Staff Survey results. The IntegratedEthics Council will compile information about the gaps in ethics quality that were identified through the IntegratedEthics Staff Survey. Your job, in collaboration with the council, is to prioritize the issues and concerns identified and target quality improvement initiatives to address them through the preventive ethics function.

Organize the PE Function

Organize the PE function. Once you have a handle on the principles and practice of preventive ethics it's time to think about how you'll organize preventive ethics in your facility—for example, you might integrate preventive ethics into the operations of existing services or programs, such as quality management. The preventive ethics primer lays out some possibilities for you to consider. Your decision should hinge on what you think will be the most successful approach, given the unique context of your facility.

Identify members of PE function. Hand in hand with organizing the preventive ethics function is recruiting members for your preventive ethics team. The preventive ethics function is only as effective as the membership of your team. With the assistance of the IntegratedEthics Program Officer, recruit team members carefully, referring to the primer for guidance. Ideally, your team will include staff who have expertise in ethics and quality improvement and a representative from facility administration.

Draft a PE policy. The structure, function, and process of preventive ethics should be formalized in institutional policy. Your IntegratedEthics Council will develop overall policy for IntegratedEthics in your facility; you'll work with your IntegratedEthics Program Officer to draft the section governing preventive ethics. Be sure to address all the topics outlined in the primer. The drafting process will help your team clarify and stay focused on your core mission. Don't wait for the council to release the final IntegratedEthics policy to begin implementing preventive ethics! The team should begin implementing ISSUES cycles as soon as the members have read the primer and taken the video course, as described below.

Educate PE Team

Distribute IE communications materials. Ensure that members receive and read the introduction to IntegratedEthics (Tab 1) and communications materials (Tab 4) in this toolkit to familiarize themselves with the concepts and aims of IntegratedEthics.

Distribute PE primer. The success of preventive ethics hinges on a well-informed, committed team. At this point, it's time to begin building the expertise of the Preventive Ethics Team. Team members should carefully review the preventive ethics primer, *Preventive Ethics: Addressing Ethics Quality Gaps on a Systems Level*.

Schedule and organize PE video course. The preventive ethics video course is an excellent vehicle to promote team building and teach the members of your team about preventive ethics and the ISSUES approach. See the training checklist for details. Keep track of who completed the course and when; follow facility procedures to ensure that team members receive education credits for completing the course.

Discuss PE results from IE Facility Workbook. Discussing the preventive ethics section of the facility workbook will help you and your team to assess the degree to which your facility is already undertaking preventive ethics activities, where in the organization this may be occurring, who is responsible, and what processes are applied. The workbook will also help you to recognize what next steps you may take to initiate or enhance preventive ethics in your facility.

Use the ISSUES Approach

Establish and maintain PE contacts. To be effective, your team must build and maintain strong relationships with key individuals, offices, and programs in the facility. Such contacts will help you in a variety of ways, for example, by alerting you to potential ethics issues that need to be addressed. You'll wish to review the goals and objectives of the preventive ethics team with these individuals and help them understand how the preventive ethics approach can help them to improve ethics quality. Key contacts include the Ethics Consultation Coordinator and IntegratedEthics Program Officer, senior leaders, service and program heads, and quality management staff.

Assemble list of issues. Based on data collected from key contacts, the IntegratedEthics Staff Survey, accreditation reviews, satisfaction surveys, etc., your team should develop a list of issues that may be appropriate for the ISSUES approach.

Begin your first ISSUES cycle. After your team has compiled a list of issues that are appropriate for preventive ethics and clarified and prioritized the improvement goals, you are ready to select an issue and begin your first ISSUES cycle. Remember to refer to the preventive ethics primer as you proceed to ensure that you address all the steps in the process. Begin additional cycles at your own pace. Experienced preventive ethics teams often work on several ethics issues simultaneously.

Continuously improve your PE process. As you complete each ISSUES cycle, be sure to critically examine your process so that you can continuously improve.

IntegratedEthics Council—Instructions for Council Members

Your Role and Responsibilities

The aim of an IntegratedEthics program is to improve ethics quality by integrating three core functions: ethics consultation, preventive ethics, and ethical leadership. The IntegratedEthics Council is the body chiefly responsible for achieving this goal. The council is chaired by the Ethical Leadership Coordinator, who is ultimately responsible for the success of the program. The responsibilities of the council are to:

- coordinate the ethics consultation, preventive ethics, and ethical leadership functions
- ensure communication with relevant programs across the organization
- oversee the ethics consultation and preventive ethics functions
- develop and update policy pertaining to the IntegratedEthics program
- coordinate staff education regarding IntegratedEthics and ethics
- evaluate your facility's IntegratedEthics structures and processes
- evaluate ethics knowledge, practices, and culture in your facility
- improve specific ethics practices at your facility
- continuously improve your facility's IntegratedEthics program
- ensure that the facility meets accreditation standards for ethics
- ensure that the facility meets requirements of VHA policy related to ethics in health care

Broadly, your responsibilities are to:

1. Demonstrate expertise in the IntegratedEthics model

Members of the council act as representatives of the IntegratedEthics program across the facility and particularly in their home departments or services. You should be raising the visibility of the IntegratedEthics program and supporting the goals of the program to ensure its success. This role requires that you understand the activities of the council and each of the core functions of IntegratedEthics, serve as a spokesperson for the program in your department or service, encourage staff to participate in training activities, answer questions about the program and its functions, and participate in program activities as appropriate based on your skills and expertise.

2. Lead or participate in council activities

A tenet of excellence in health care is an ongoing commitment to quality improvement. All council members should participate in efforts to improve the quality of the IntegratedEthics program through use of the IntegratedEthics assessment tools and regular quality monitoring of program activities. You'll lead or participate in one or more council activities, which may include participating on a preventive ethics team, leading an education forum about IntegratedEthics for staff or other leaders, updating ethics-related policies, supporting efforts for accreditation readiness, or other activities as needed.

3. Ensure integration

The council is the key mechanism for integrating the ethics activities undertaken by departments, programs, services, and offices across your facility. Council members should represent diverse areas throughout the organization from which ethics issues arise, including clinical care services, research, and business administration. Council members are responsible for helping to identify ethics issues across the facility that might benefit from the work of the council, such as ethics quality gaps that might be appropriate for the preventive ethics team.

4. Monitor performance

The council is responsible for overseeing the activities of the IntegratedEthics program and acting to support its implementation. The council should ensure that the facility achieves the program's implementation goals, completes assessment tools and reports performance monitors to VISN leadership. The council is also responsible for developing plans and taking action on the findings from the IntegratedEthics Facility Workbook and Staff Survey. The council should establish mechanisms to monitor progress toward implementing these plans and the overall IntegratedEthics program effectively.

5. Network externally

All council members are invited to share their program's activities, best practices, and lessons learned. The National Center for Ethics in Health Care will provide forums where this can occur. Check our website, www.ethics.va.gov/IntegratedEthics, for more information.

Description of Tasks

Get Started

Get to know the IntegratedEthics Program. Reading the introduction to IntegratedEthics and the IntegratedEthics communications materials is an important first step to ensure that you understand the broad concepts and aims of IntegratedEthics. You'll also want to become familiar with the material in the three primers, *Ethics Consultation: Responding to Ethics Questions in Health Care*; *Preventive Ethics: Addressing Ethics Quality Gaps on a Systems Level*; and *Ethical Leadership: Fostering an Ethical Environment & Culture*. You'll return to these documents frequently as you support the launch of IntegratedEthics at your facility. Three IntegratedEthics video courses are also available to you. These courses walk you through important aspects of each of the functions. You may also want to complete one or more of the IntegratedEthics online learning modules to develop your understanding of the IntegratedEthics concept and its application.

Engage with the National IE Community

Register with the national IntegratedEthics website. Council members may wish to register with the IntegratedEthics website (vaww.ethics.va.gov/IntegratedEthics), which is designed to support continuous learning among VA's IntegratedEthics community. The site contains all the materials in the IntegratedEthics toolkits (including the video courses), links to online learning modules, and many other resources and tools. It will be updated regularly.

Understand Your Current Ethics Program

Participate in completion of the IE Facility Workbook. The IntegratedEthics Council is responsible for ensuring completion of the facility workbook. You should contribute your knowledge of facility structure and processes to help the council develop its plan for completing the workbook. You should also participate as needed to identify and implement appropriate responses to workbook findings.

Support administration of the IE Staff Survey. The IntegratedEthics Council is responsible for planning and monitoring the administration of the IntegratedEthics Staff Survey. You should support the council in administering the survey by encouraging staff in your department to participate. The council is also responsible for analyzing survey results and developing a plan to respond to any issues and concerns identified. Your first step is to help publicize the results of the survey, which is essential to demonstrate to staff members that their participation was both important and appreciated. It can also help to further demonstrate the importance of IntegratedEthics and generate greater awareness of your IntegratedEthics program. You will then work with your staff to implement activities developed by the council to respond to the survey results.

Participate in Assigned Council Duties

Coordinate staff education regarding IntegratedEthics and ethics. The council is responsible for taking a systematic approach to ensuring that staff throughout the facility are familiar with IntegratedEthics and knowledgeable about ethics in health care. The council, or a designated subcommittee, should apply a quality improvement approach to ensure that educational efforts are effective in meeting clearly defined

organizational needs. The IntegratedEthics primers, video courses, and online learning modules can serve as basic resources for staff education. Efforts to educate staff in ethics consultation and preventive ethics can be delegated to those functions. Ethics education should also be regularly incorporated into ongoing educational activities, such as grand rounds, case conferences, inservices, and annual meetings.

Update policy related to ethics in health care. In addition to developing policy for your IntegratedEthics program, the council is responsible for ensuring that facility policies relating to ethics in health care—such as informed consent for treatments and procedures, advance directives, or end-of-life care—meet the requirements of VA national policy in the relevant areas. The council or a designated subcommittee should also work with the preventive ethics team to identify and address local policy requirements—or lack of policy—that give rise to systemic ethics quality issues.

Ensure that the facility meets accreditation standards for ethics. The council is responsible for developing specific action plans to ensure that the facility meets accreditation standards around ethics and is ready to meet those standards on an ongoing basis. As of 2006, the Joint Commission on the Accreditation of Healthcare Organizations includes 24 standards explicitly pertaining to ethics, patient rights, and organizational responsibilities (RI.1–RI.3.1). It is the council's responsibility to see that the facility meets these standards and those of other relevant accrediting bodies.