

Finding the Heart of Home Care: The Bayada Way Project

By Mark Baiada and Albert Freedman, Ph. D.



Baby Jack and his nurse Wendy

Forward by Albert Freedman, Ph.D.

Ten years ago, when our six-month-old baby was diagnosed with an incurable neuromuscular disease, our family was forever changed. As parents, my wife, Anne, and I were abruptly launched into a new world. Jack could not swallow food safely, so he would need a feeding tube. Because our son would never sit up or walk, Jack would need a child-sized wheelchair. Breathing would be difficult, so we were introduced to respiratory treatments, life-saving interventions, and the proper use of a bi-pap ventilator. A doctor told us Jack had one year to live. After two weeks of medical consultations, reeling from the emotional impact of our baby's prognosis, Anne and I took our baby home with the expectation we would lose him.

Despite our baby's poor prognosis, we never gave up our hope. Somehow, in the face of long odds, Jack lived longer than one year. We felt surprised and blessed when Jack celebrated his second birthday, and then his third. But after a number of harrowing illnesses, Jack's care became more and more demand-

ing, and Anne and I realized we would need help. We were introduced to a local home health care agency and a nurse named Wendy arrived at our home to help us take care of Jack. Over time, Wendy gained our trust and developed a very important relationship with our son and our family. I will always be grateful to Wendy for the special qualities she brought to our home in those early years: confidence, skill, kindness, and most importantly, hope.

As time passed, I began to view each day with Jack as a gift. I searched for meaning in the face of such an unusual and challenging parenting experience. I began to share Jack's story with others by writing and speaking. I was surprised and honored when Mark Baiada, the president of the home health care company responsible for Jack's nursing care, asked me to help him.

Introduction by Mark Baiada

As we celebrated our 25th year of providing home health care services, I realized that Bayada Nurses needed a clearer expression of what is most important about the work we do and the way we should do our work, in spirit and in action. I felt that a clearly expressed written statement of our company's values would provide a powerful and shared understanding of our collective purpose and lead to a renewed commitment to our daily work. For over a quarter century, Bayada Nurses successfully provided home health care services by following important, but unspoken, principles. I felt it was time to organize and state these principles so we as a group could be clearer about what we believe in and what we stand for in our work.

I searched for a way to find and express what is most important about our work. Then I met Dr. Al Freedman because we care for his son, Jack. I read his article, *"Welcome to Our Home" (Freedman, 2001)*, attended a workshop he led, and sensed a deep understanding of the importance and the meaning of our work. I asked Dr. Freedman to help me to find the answers to some very important questions for our organization: What does Bayada Nurses stand for? What do we believe in? What are our core values? What are the special ingredients that make our company unique? What is the Bayada way of conducting our work? In the summer of 2002, Dr. Freedman and I constructed a plan for a company-wide initiative to search for the words that best express the heart and meaning of our work as home health care professionals.



The Pendle Hill Retreat: Clarifying Beliefs and Values

Goals of The Bayada Way Project

Our first goal as we conceived of The Bayada Way Project was to provide an opportunity for home health care professionals to **reconnect with the heart and meaning of our work** (Trueman & Murray, 2003). Although the patient should be the primary focus of attention of service providers, our country's increasingly complicated health care service delivery system often neglects the human aspects of patient care. We believe most health care professionals enter the field with a set of core beliefs and values, but the task-oriented nature of the work does not leave adequate opportunity for ongoing reflection. By providing an opportunity for Bayada Nurses employees to talk about the most critical aspects of their work, we hoped to bring people together in the spirit of our common cause: *to help everyone*.

The second goal of this initiative is to **clarify Bayada Nurses' beliefs and values**. Identifying and clearly articulating the core values of an organization is critical, because a company's values represent what an organization stands for and believes in. A clearly defined statement of our values will serve as a foundational compass for each person in our company.

A third goal of The Bayada Way Project is to effectively **communicate the company's beliefs and values** now and in the future. If we are clear about what we stand for and what we believe, health care professionals who share our beliefs and values will choose to join us in our work. We want people to be proud to join and be a part of the organization. We would like *The Bayada Way* to become a lasting legacy, articulated by our present generation of employees, and passed on to colleagues who will carry on this important work in the future.

If we are clear about our core values, and if we hold ourselves to the highest standards, our day-to-day practices should ultimately reflect those same values. When it becomes clear that a Bayada Nurses' practice is not consistent with our stated values, we will together take steps to close that gap. The fourth goal of this project, therefore, is to **align** (Blanchard & O'Connor, 1997) **our declared values and our day-to-day practices**.

Finally, the ultimate goal as Bayada Nurses embarks on this initiative is clear: **to provide clients and their families with the highest quality home health care services available**.

Clarifying Our Values

As we began our search for the right words to convey Bayada Nurses' core values, we felt strongly that everyone with a stake in the organization would have something meaningful to contribute to the process. Accordingly, we invited participation from clients and their family members, field nurses and home health

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aides, nursing supervisors, office staff, support personnel, and administrators. Over a period of two and a half years, we received feedback through focus groups, overnight retreats, a company-wide survey, and discussion sessions in response to written drafts of *The Bayada Way*.

Focus groups: We began The Bayada Way Project by holding approximately 25 small group discussions in multiple office locations over a ten-month period (Bayada & Freedman, 2003). Groups of clients, field staff, office staff and administrators met for 60-90 minute sessions and responded to a series of questions, including:

- What provides you with a sense of satisfaction in your day-to-day work?
- Nurses can choose where to work because of the nursing shortage. Why choose to work at Bayada Nurses?



The Xavier Retreat: Helping Define The Bayada Way

- What are the special ingredients that make Bayada Nurses a unique organization?
- A Bayada Nurses publication states: “Our clients say we practice with our hearts, not just our heads”. Can you describe any nurses or home health aides you know who practice with their hearts?
- What values do you feel are most critical to the work of a home health care company?

Retreats: After collating the data recorded from focus groups, a series of three 24-hour retreats were held. The purpose of the retreats was to examine in greater depth the themes that emerged during focus group discussions. The three retreats were held at Pendle Hill Quaker Retreat Center in Wallingford, Pennsylvania; Xavier Retreat Center at St. Elizabeth College, Convent Station, New Jersey; and Graylyn Conference Center at Wake Forest University, Winston-Salem, North Carolina. The 75 retreat participants represented 41 different Bayada Nurses offices and included nurses, home health aides, staff supervisors, support personnel, nursing supervisors, and office directors.

Participants were led through a series of activities and discussions designed to further refine our understanding of *The Bayada Way*, including:

- A values-clarification exercise (*Blanchard & O'Connor, 1997*)
 - What are the core values of our organization?
 - Why did you choose these particular values?
 - What do these values mean to you in your work?
 - What specific actions do we take each day to put these values into practice for our clients?
- Whole group discussion queries:
 - What was the path that led you to your work in home health care?
 - Was there a person or event that led you to work in health care?
 - Did your own core beliefs and values lead you here?
 - In what ways is your work meaningful to you?

Feedback from NAHC members: We presented the rationale, design and preliminary findings of our work at the National Association of Home Care Annual

Figure 1:

Statements by Bayada Nurses' employees and clients in focus groups, retreats, and surveys:

"We love being a part of our team. We're proud of our work. We feel like a family. We understand and support each other. We all feel the same way—we want to do the right thing for our patients..."
(nursing supervisor, focus group, Pennsylvania)

"We need to remember what's really important about our work each day. Giving support, love, and going the extra mile—paying attention to the little things—goes a long way. To me, that's The Bayada Way. We need to celebrate life, personally and professionally, and appreciate those around us. Bayada Nurses is a community to which all of us, employees and clients, can feel connected."
(staff supervisor, retreat, New Jersey)

"We try to care for our patients exactly the way we would want to be cared for ourselves."
(nursing supervisor, focus group, Pennsylvania)

"The Bayada Way is holistic—it must encompass and embody a focus on patient care at many levels—emotional, spiritual, and medical—all of which are conducive to 'quality of life.' If we can accomplish this, we've transcended home care to an art form that brings to the table knowledge with an applied practical wisdom. The Bayada Way has a heart and a soul that will live on long after we're gone."
(field nurse, retreat, North Carolina)

"We are called upon to help in very difficult situations and we say yes. We feel a profound responsibility to our clients and their families."
(division director, focus group, New Jersey)

"Bayada Nurses has given me back my life. They gave me encouragement when I was in my darkest moments. They made me see that having a tracheotomy was not the end of my life—I could have a future. Everyone I have had contact with in your organization has shown such understanding, compassion, and a sincere interest in my medical problems as well as showing me they truly care about what happens to me. I thank God every day for Bayada Nurses and the work they do not only for me, but for thousands of others. Thank you for being there for people like me."
(client, survey response, Florida)

Conference (Baiada & Freedman, 2003; Baiada & Freedman, 2004). Workshop participants included home health care administrators, practitioners and policy makers from home health care organizations throughout the United States and Canada. Time was allotted for workshop participants to provide feedback by completing the values-clarification exercise included in our Bayada Nurses retreats and through question and answer sessions. In addition to receiving qualitative feedback about our initiative from professionals outside our own company, the data collected from NAHC members provided us an opportunity to examine patterns in responses to the values-clarification exercise between Bayada Nurses employees and employees of other home health care organizations.

Surveys: Following a qualitative analysis of data collected from focus group and retreat discussions, we designed a confidential, written survey to further refine

The most commonly identified values, across all constituencies, were "reliability" and "compassion".

our understanding of *The Bayada Way*. A printed survey form, a cover letter, and a business-reply envelope were either hand-delivered or mailed to 19,155 client families, field employees, and office staff members. Respondents were offered the option to return the survey by mail or to complete the survey online. Over a three-month period, we received 5,135 completed surveys (26.8 percent response rate). In addition to eliciting basic demographic information, a series of multiple choice questions and one open-ended question were included on the survey. Survey respondents were asked to select three values, qualities, and practices most critical to the work of home health care professionals from lists of eight, in multiple choice format.

Synthesis of Data

We took the first step to formulate language for our written statement of values and beliefs by making a list of the most common themes identified by participants throughout the process (Examples, Figure 1). We then organized our list of emerging themes into five basic areas.



Spreading the Word in The Bayada Way Tour Bus

1. **Core values:** A number of specific values were identified as the most critical to the work of home care professionals. The most commonly identified values, across all constituencies, were “reliability” and “compassion”. A cluster of values related to the concept of high standards also emerged in our analysis, including “excellence”, “professionalism”, and “skill”.

2. **Core beliefs:** A set of organizational beliefs emerged from the data, including the primary importance of the needs of clients, the value of employees to the organization, the importance of building relationships, and service to the community.

3. **Core practices:** A range of clinical, supervisory, educational, and business practices was identified. We came to view these practices as examples of specific actions taken by employees to enact the company’s core values and beliefs.

4. **A spiritual dimension:** During our focus group and retreat discussions, many participants acknowledged the personal and emotional impact of their experiences in spiritual terms. Words such as faith, hope, and love were often used in discussions. We came to understand this aspect of *The Bayada Way* as the universal spirit that brings meaning to our lives and our work and brings us together for the higher purpose of providing support and care to people in need. We can not overemphasize the importance of this spiritual dimension.

5. **“Getting the job done”:** As we sought feedback from clients and employees, many emphasized that our stated values and beliefs must be backed up with action, which requires hard work, determination, creativity, and energy. The nursing shortage presents challenges to the home care industry and leaves families often feeling vulnerable. So as we worked through the process of clarifying Bayada Nurses’ values and beliefs, we came to the realization that a caring spirit only counts if we “get the job done.”

Communicating The Bayada Way

In response to a first draft document of *The Bayada Way*, we were encouraged to include specific, concrete examples of actions taken by employees in their daily work which demonstrate the company’s three identified core values: **compassion**, **excellence**, and **reliability** (O’Connor, 2004). With this recommendation in mind, we operationalized each of the three primary core values by developing “key actions” consistent with these values, and the “key results” of taking these actions.

We then organized our written draft of *The Bayada Way* into four sections: Our Mission, Our Vision, Our Beliefs, and Our Values. The company’s existing Mission Statement was reviewed, revised, and included as the first section of *The Bayada Way*. The second section of the document, a vision statement, is the product of Mr. Baiada’s personal aspiration for the organization to help more and more people and to provide services to clients internationally. The third and fourth sections of *The Bayada Way* include statements



The BAYADA[®] Way

Our clients come first.

OUR MISSION

Bayada Nurses has a special purpose—to help people have a safe home life with comfort, independence, and dignity. Bayada Nurses provides skilled, rehabilitative, therapeutic, and personal home health care services to children, adults, and seniors nationwide. We care for our clients 24 hours a day, seven days a week.







Families coping with significant illness or disability need help and support while caring for a family member. Our goal at Bayada Nurses is to provide the highest quality home health care services available. We believe our clients and their families deserve home health care delivered with **compassion, excellence, and reliability**, our Bayada Nurses' core values.

OUR VISION

With a strong commitment from each of us, Bayada Nurses will make it possible for millions of people worldwide to experience a better quality of life in the comfort of their own homes. We want to build and maintain a lasting legacy as the world's most compassionate and trusted team of home health care professionals.

We will accomplish our mission and achieve our vision by following our core beliefs and values.

OUR BELIEFS

-  We believe our clients come first.
-  We believe our employees are Bayada Nurses' greatest asset.
-  We believe that building relationships and working together are critical to our success as a community of compassionate caregivers.
-  We believe we must demonstrate honesty and integrity at all times.
-  We believe in providing community service where we live and work.
-  We believe it is our responsibility to maintain the organization's strong financial foundation and to support its growth.

of the company's beliefs and values. We received feedback on drafts of the document by holding eight small group sessions with a total of 75 field and office employees. We received additional feedback during the writing process from ten client families. As feedback

was received, we shepherded *The Bayada Way* through a series of drafts.

As we approached the company's Annual Meeting in April, 2005, we felt we had reached consensus on the

OUR VALUES

Our work is guided by our fundamental values.

Compassion

Key Result: Our clients and their families feel cared for and supported.

Key Actions:

- Work with a spirit of universal faith, hope, and love.
- Demonstrate exceptional care and kindness to others. Be led by our hearts.
- Be respectful. Treat others the way they wish to be treated.
- Listen closely, show empathy, and respond to the needs of others.
- Be friendly. Let our smiles be seen and felt.

Excellence

Key Result: We provide home health care services to our clients with the highest professional, ethical, and safety standards.

Key Actions:

- Consistently demonstrate the highest level of skill, competence, and sound judgment in our work.
- Demonstrate honesty, commitment, and loyalty to our clients and their families, to fellow employees, and to our organization.
- Strive to provide the very best service to our clients. Set specific goals and work hard and efficiently to achieve them.
- Continuously improve our work through evaluation, education, and training.
- Recognize and reward those who set and maintain the highest standards of excellence.

Reliability

Key Result: Our clients and their families can rely on us and are able to live their lives to the fullest, with a sense of well-being, dignity, and trust.

Key Actions:

- Keep our commitments as promised.
- Consistently deliver expected services.
- Fulfill our clients' needs promptly and thoroughly.
- Be creative, flexible, and determined — get the job done for our clients.
- Communicate clearly and consistently with clients and fellow employees.



content of the document. During a meeting of the company's 124 office directors, we presented the *The Bayada Way* (Figure 2). One day later, we introduced *The Bayada Way* in the form of a PowerPoint presentation to approximately 900 office staff members who

attended the company's Annual Awards Meeting in Baltimore, Maryland.

Internal communication of *The Bayada Way* is taking place as this article goes to press. Mr. Baiada and his



Fanfare at the Media, PA Tour Visit

wife, Ann, plan to visit each of the company's 124 service and support offices to educate employees about this initiative, and to encourage staff members to identify colleagues who exemplify *The Bayada Way*. We feel it is important for Bayada Nurse office employees to become familiar with the language and meaning of *The*

Home health care professionals want to belong to an organization that truly believes in its mission and purpose.

Bayada Way as an initial step in our communications process. The second step in our communications process will include all Bayada Nurses field staff, clients, and all others associated with the organization, and will be led by the large group of office employees who are now being introduced to the document and its meaning.

Living The Bayada Way

Looking ahead, the next phase of this initiative will involve a process of self-evaluation. Each employee of Bayada Nurses will be encouraged to ask the ques-

tions, "Are my own actions in keeping with the organization's values and beliefs? Are our collective day-to-day practices aligned with our values and beliefs?" We view this process of self-evaluation as a critical first step towards ongoing, continuous organizational improvement.

As we look back over the past three years of developing *The Bayada Way*, we are encouraged by the enthusiastic and positive feedback we have received from professionals within and outside Bayada Nurses. Throughout this project, it has become clear to us that home health care professionals want to belong to an organization that truly believes in its mission and purpose. People want to be a part of a community of caregivers.

Given the opportunity to reflect on the meaning of their work, we have found that home health care professionals genuinely believe in their ability to make a difference in the lives of clients and families. Indeed, home health care professionals have a unique opportunity to make the world a better place and to contribute to the greater good. We believe clients and their families will receive the care and kindness they need and deserve, if our practices as home health care professionals are rooted in a set of clearly articulated organizational values and beliefs. In *The Bayada Way*, we believe we have found the words that most effectively express the ideals and principles at the heart of home care.



Jack Freedman, age 10, and his nurse, Patrice



About the Authors:

Mark Baiada (right) is the founder and president of Bayada Nurses. Bayada Nurses provides home care services to pediatric and adult clients through a network of 124 offices in 15 states, with headquarters in Moorestown, New Jersey. Email: mbaiada@bayada.com

Albert Freedman, Ph.D. (left) is a child and family psychologist in independent practice, a frequent speaker on the topic of caring for children with special needs, and a consultant to Bayada Nurses. His son, Jack, is now ten years old. The Freedman family lives in West Chester, Pennsylvania. Email: afreedman@bayada.com

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