

Creating a Shared Values Agenda to Advance Child Health

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The factors that affect the health of children cross all sectors of society, as do the resources, skills, and talents needed to improve child health.¹⁻³ Health care providers and organizations are challenged in addressing these health conditions within the bounds of the health care system and are increasing their involvement in community-based efforts to improve health by working together in collaborative efforts that involve multiple sectors and stakeholders, including the corporate sector.⁴

It is important for the American Academy of Pediatrics (AAP) to interact with the corporate sector in a way that emphasizes its mission, vision, and values, in addition to the traditional guidelines that focused on financial transparency and the management of conflict of interest.⁵ For example, the AAP has endorsed the Council on Medical Subspecialty Societies guidelines,⁶ which provide guidance to member societies in the development of policies and procedures that safeguard the independence of their programs, policies, and advocacy positions. In addition to these guidelines, the AAP has developed a robust mechanism for identifying and resolving conflicts of interest. However, there has been recognition by leadership that although crucial, these safeguards did not provide a mechanism for explicitly identifying and discussing mission alignment that would allow increased collaboration and collective impact. As a consequence, the AAP developed a tool to move the conversation toward one that is values based and mission oriented, borrowing from the concept of “shared values.” This

concept has been in circulation in the corporate world since 2006, when it was advanced by Porter and Kramer to describe ways in which corporations could meet their mission of sustainability and profitability while also achieving positive social aims.⁷ The Academy’s use of the term “shared values” is derived from this concept. The shared values pyramid was developed to go beyond the traditional guidelines for industry into a discussion that focused on shared organizational culture, values, and mission to ensure that the AAP’s relationships with corporate funders and partners serve the best interests of children (Fig 1).

There are 4 levels describing the nature of organizational relationships: transactional, short-term interactional, values shared, and child health mission collaboration. The following are descriptions and examples of the 4 levels drawn from actual relationships.

A transactional relationship is constructed to meet an immediate need, such as when a new educational offering is developed (patient brochure, toolkit, or book) that provides a discrete opportunity for corporate visibility and interaction in real time. These are often 1-time opportunities, and funders engage to fulfill their objective around a single issue or specific focus. Many interactions appropriately remain at this level of engagement.

Short-term interactional relationships involve organizations supporting associations between each other that move forward a priority that is related directly or indirectly to one

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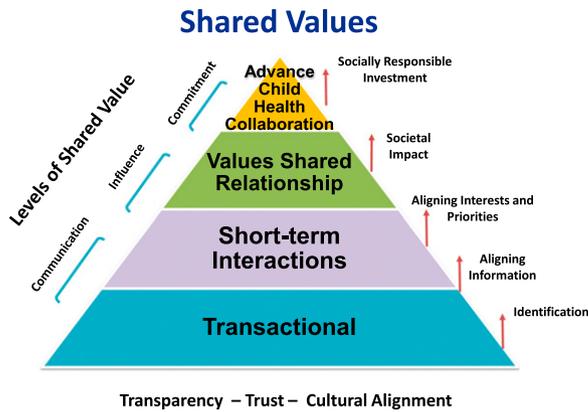


FIGURE 1
Elements of the shared values pyramid.

organization’s product or a specific issue important to their mission. These relationships are broader in terms of their commitment and support and carry a time-defined exposure, such as supporting the AAP’s oral health strategic priority for 2 to 3 years to publish patient education materials or a time-limited public awareness campaign.

In a values shared relationship, ongoing conversations involve organizational strategy, common values, and mutual advancement of priorities. Building this relationship includes multiple interactions and engagements, increasingly transparent communication, and may involve multiple projects through a defined time period. One example is the same corporation sponsoring a continuing medical education publication, a Web site, and a toolkit over multiple years. Organizations begin to share their unique drivers, their challenges, and their constraints for collaboration.

At the apex of the shared values pyramid is the collaboration to advance the child health mission. In this relationship, partners are seeking optimal alignment to the mission and positive impact on child health and wellness. Development of project support is broader and multiyear commitments are in place. Conversations about priorities surrounding organizations and child health and well-being occur, as well

as mutual learning and sharing of strengths and knowledge unique to both organizations. Both organizations commit to meaningful advancement and articulation of an important child health and wellness goal or the creation of a broad-based platform that provides needed support and access to tools that enhance the mission of child health and wellness. At this level, there is transparent discussion of mutual values, potential barriers to collaboration, and joint responsibility. Movement from the base toward the apex of the pyramid has resulted in longer-term relationships and increased sustainability for programs and initiatives and opportunities for the AAP to engage with multisector collaborative initiatives involving the business community,

With these levels in mind, it is important to note that the values of trust, transparency, and cultural alignment are at the base of the triangle. These values form the basis for any discussion of relationship or partnership and are discussed with funders before advancement through the pyramid can occur. They also serve as touchstones for existing relationships when difficulties are encountered or organizational culture changes and trust needs to be rebuilt. Process steps along the left side of the triangle, communication, influence, and commitment, signify the goals for deepening the relationship.

The right side of the pyramid illustrates potential outcomes of the relationship starting with relatively simple brand identification at the transactional stage and moving to aligning information and education around a shared topic. As the relationship progresses toward shared values, the expectation is that interests and priorities are more aligned and that the impact of the mutual investment is larger. At the apex of mission alignment, the goal of socially responsible investment is met.

The shared values approach has been approved by the AAP Board and Executive Committee and the following are examples of how this construct has been used in practice.

MAPPING CURRENT RELATIONSHIPS

The AAP development staff used the pyramid to categorize each of the corporate relationships they were responsible for managing. For example, based on their experience with the kind of relationship they had with “corporation A,” they placed that relationship at the transactional level, whereas they put “corporation B” at the values shared level. The staff was able to easily categorize each relationship and to identify certain relationships that could progress farther up the pyramid toward mission alignment and others that seemed to be well categorized and stable at their current state. This exercise allowed the staff to consider how they were resourcing the work with partners and how to align staff effort toward the level of relationship.

TESTING VALUE WITH CORPORATE PARTNERS

AAP leaders presented the shared values pyramid to a meeting of existing corporate and foundation partners along with the Academy’s Mission and Agenda for Children. Corporations responded positively

to the shared values pyramid. All the corporate partners wanted to know how the AAP categorized their relationship on the pyramid and how to advance their relationship toward the apex of mission alignment.

TESTING VALUE IN A POSITIVE RELATIONSHIP

The shared values pyramid was introduced into discussions with organizations that had supported programs and projects over many years. Its use opened up a new discussion of the missions of AAP and the corporation, and brought forward the desire of the AAP for alignment around vision and values. It also facilitated a discussion of the role of profit and branding as well as their corporate definitions of shared value and social responsibility. This approach increased understanding of how successful partnerships looked from both perspectives, what drivers the corporation was responding to, and what measures of success might be used.

TESTING VALUE IN A DIFFICULT RELATIONSHIP

In relationships that were encountering difficulty, this tool was introduced into the discussion to set the stage for talking about the foundational values of trust, transparency, and cultural alignment.

In one case, instead of ceasing discussion when disagreements arose, the use of the shared values pyramid prompted a meeting to have a specific conversation about how to build trust, and understand mutual drivers and barriers.

CONCLUSIONS

The shared values approach builds on the AAP's guidelines for industry and conflict of interest initiatives. It reflects the desire of the board and leadership to engage funders in a new way. As a tool to encourage healthy dialogue with regard to new organizational relationships, the shared values pyramid has helped navigating the imperative of collaborating with a diverse group of stakeholders to advance the AAP's mission and vision while also setting a framework that promotes transparency and openness within and about such relationships. The tool can be a useful mechanism to forge new organizational relationships for the benefit of children, describe the relationships that currently exist, and better target resources toward maximizing alignment and collaboration.

ABBREVIATION

AAP: American Academy of Pediatrics

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