Carilion Clinic & Excellence: A Case Study Evaluating Excellence in a Clinic-model Structured Health Organization

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Abstract

The aim of this thesis is to explore how public relations contributes to organizational culture at Carilion Clinic, a large health organization based in Roanoke, Va. Using the excellence theory combined with organizational culture perspectives as a lens, the study interviewed Carilion Clinic communications employees to uncover the presence of excellence principles in their public relations. A second part of the study analyzed employee posts on the organization's internal website to identify the congruency of organizational value meaning and manifestation between the organization and its employees. Results from the study found presence of five of the seven excellence principles in Carilion's public relations and that three of the five organizational values are congruent between the organization and its employees. Results suggest that Carilion Clinic's public relations efforts are contributing to organizational culture. Efforts by Carilion's public relations successfully communicate organizational values and foster a participative culture. This case study shows that public relations is beneficial to fostering organizational culture and that excellence principles as developed by the excellence theory can serve as a guide for organizations when implementing and evaluating public relations practices.

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General Audience Abstract

The aim of this thesis is to explore how public relations contributes to organizational culture at Carilion Clinic, a large health organization based in Roanoke, VA. Interviews with communications employees and an analysis of employee communications was conducted to identify how the organization's public relations contribute to the fostering of culture within the organization. Results suggest that certain public relations efforts are successful in fostering an organization's culture. This case study shows that public relations is beneficial in ways more than just communicating with organizational publics.

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Chapter 1 Introduction

Issues in the healthcare industry continue to arise with the advancement of technology, the growing population and healthcare regulation; all of which have created problems for health organizations. To cope with these issues, organizational structure in the healthcare industry has evolved and the need for public relations continues to be important. As the largest health organization in Southwestern Virginia, Carilion Clinic is no stranger to the evolution of organizational structure. Once operated under a health system model, Carilion Clinic now operates under the clinic model to combine practice and education to better provide care for patients. As organizations expand and re-shape themselves, public relations become an integral component in helping communicate organizational, structural and cultural changes to the organization's various publics and stakeholders. This thesis seeks to explore how Carilion Clinic's public relations contribute to the organization's internal culture.

Technology has changed healthcare in many ways. Today, humans can access medical information 24/7. People can now look to the Internet to help diagnose and treat medical problems; this can be problematic as misdiagnosis and false treatments can occur. On the other hand, technology has allowed for the invention of medical devices that can save lives, such as pacemakers and ECG monitors. Technology has allowed for the invention of mobile applications that allow patients access to their medical records anytime and allows them direct contact with medical professionals. As seen, technology can be beneficial as well as problematic for the healthcare industry.

A growing population has also caused issues for the healthcare industry. As the population continues to age and technology advances, humans are living longer. The amount of care needed to provide for humans is constantly growing at a rate that the healthcare industry

may not be able to keep up with. As a result, the industry is expanding, which could be beneficial as it creates jobs and allows more opportunities for learning. A growing population can also be a drawback. This requires health organizations to expand and provide a wider variety of care that many organizations may not be able to currently accomplish or afford.

As evidenced in the 2016 presidential election, healthcare regulation has been a highly-debated topic. Supporters of regulation argue that healthcare costs are too high and that access to healthcare has been limited; regulating healthcare will therefore benefit Americans. Opponents argue that healthcare reform will increase costs for individuals and families and feel that this will be detrimental to many Americans. Healthcare reform is not only affecting consumers; doctors, physicians and health organizations also face constraints from regulation.

A review of literature on hospital downsizing from 1990 to 2002 revealed that healthcare system changes and financial pressures were significant factors of hospital down-sizing (Unruh & Beyers, 2002). Hospital down-sizing methods have been narrowed to three categories: reducing the number of employees, integration of hospital units and outsourcing (Mousazadeh, Jannati, Beiramy, AsghariJafarabadi & Ebadi, 2013). In fact, over the past 25 years, around 200,000 hospital beds have been closed (Cosgrove, 2011). To help cope with financial pressures, hospitals have begun outsourcing and integrating hospital units.

Due to the issues presented, among many others, the structure of health organizations has changed drastically in the past decade. Traditionally, healthcare has been a physician-centered model (Hetherington, Ekachai & Parkinson, 2001), which means that medical care was provided only when needed. More recently, this model has changed to become patient-centered. This means that healthcare is focused on keeping patients healthy and preventing illness and disease by way of routine care.

Primary physician and outpatient clinics have grown as many hospitals have experienced a loss of profit. Sixty percent of hospitals in 2003 lost money providing patient care ("The Fragile State of Hospital Finances," 2016). New technology and better drugs are allowing more patients to receive treatment outside of the hospital, which has accelerated the shift to outpatient care (Evans, 2015). In response, some health organizations have turned to outsourcing and partnering with outside physicians and outpatient clinics to reclaim some of that lost profit while offering a wide-variety of services. One method health organizations have used to achieve outsourcing and integration is adopting the clinic model. The clinic model combines education with practice while providing a multitude of health services that allow health organizations to cater to a wide variety of patients.

When organizations experience big structural changes, such as transitioning from a health system to a clinic model, it can produce other organizational changes in management, employee structure, organizational culture and the adoption or modification of mission, vision and values. This is where public relations come into play. Public relations can help to communicate internally and externally the organizational change, what the change means and help to foster organizational culture during times of organizational re-structure.

Today, public relations is still relevant in the healthcare industry. It has evolved to be more about relationship building and customer satisfaction rather than the previous focus of being used simply as an information dissemination tool (Hetherington, Ekachai & Parkinson, 2001). As an information dissemination tool, public relations is seen as a one-way communication practice. In this view, public relations sends messages to receivers but does not receive feedback.

The evolution of public relations has included responsibilities for the practice such as assisting in marketing and advertising, shaping organizational culture, communicating organizational decisions, strategic management planning and relationship management. With increased competition and regulations, it is important for health organizations to connect with publics while keeping them happy and satisfied. Public relations can help to accomplish this within an organization. When public relations within an organization is considered excellent, they can help the rest of the organization to be seen as excellent and enhance organizational performance (Grunig, 1992).

Purpose of Study

Carilion Clinic is a not-for-profit health care organization based in Roanoke, VA. With a network of hospitals, primary and specialty physician practices, a medical school partnership, and other complementary services, Carilion provides care for more than one million Virginians ("About Us", Carilion Clinic). This study seeks to identify if the excellence theory principles are present in Carilion Clinic internal public relations, evaluate how internal communications are manifesting the organizational values that help to foster Carilion's culture of excellence, and determine if Carilion Clinic can be categorized as an excellent organization.

Values are a key component to organizational culture and help to create shared meaning and understanding between an organization and its publics. As organizational culture contributes to making organizations excellent, studying how public relations play a role in shaping culture can help to gain a better understanding of the ways in which public relations can successfully contribute to the overall excellence of an organization.

Artifacts used to develop and conduct the study came from Carilion Clinic's internal website. Such artifacts include the organizational values executive summary, the *Values Pledge*

that is distributed to employees, as well as Carilion's mission, vision, and values statement. External communications such as advertisements and marketing materials were not included in the study. Participants in the study consisted of Carilion Clinic *MarCom* (the organization's marketing and communications department) employees. No external publics, such as patients and vendors, are included in the study.

Significance to Organization

Organizational values play a role in shaping culture within an organization. Identifying the excellence principles present in Carilion Clinic internal public relations allows for a look at how public relations contributes to organizational culture in a health organization that has gone through an organizational re-structure.

When organizational values are congruent with and demonstrated by employees, they experience greater work satisfaction, performance and commitment (Fitzgerald & Desjardins, 2004). As employees of health organizations are responsible for the care of patients and those in their community, it is essential that employees are happy and satisfied in the work that they do. Low employee satisfaction, performance and commitment can have a negative impact on the care and health needs of the community in which a health organization operates. Organizations have an obligation to the communities in which they reside. By creating a strong, participative culture where employees are satisfied, motivated and happy, they are better able to provide care for their patients and communities. Excellent public relations can contribute to the successful communication of mission, vision, and values which helps to influence a strong, participative organizational culture that may better the organization, benefiting patients and communities in which the organization resides.

Providing an evaluation of Carilion Clinic's public relations and how it contributes to the organizational culture allows for suggestions for improvement that might benefit the organization and its publics.

Significance to Field

The excellence theory states how public relations can contribute as a management function leading to the overall effectiveness of an organization (Grunig, 1992). This theory has been used to help develop principles of excellent public relations that can serve as a guide for organizations when evaluating the effectiveness of their public relations. However, as with many theories, the excellence theory has its criticisms. The theory relies heavily on the two-way symmetrical model of communication and maintains that this is the most effective method for public relations when communicating with publics. Some scholars believe that this model of communication is not appropriate, or even possible for every situation (Leichty, 1997; Dover, 1995; Murphy, 1991). Replication of the original excellence theory study has been conducted using a global perspective testing the principles in different cultures (Wakefield, 1997; Rhee 1999; Wakefield, 2001), but how does the excellence theory and its principles help to foster organizational culture? Do they help to better communicate organizational mission and values? The current study aims to find out.

The study will begin with an overview of the modern healthcare industry, the clinic model and background about Carilion Clinic. Next, the theoretical lens used to guide the study and relevant literature is discussed, followed by study methods and analysis. Discussion of the findings and future research are then presented.

Chapter 2 Context

Changes in Health Organizations' Structure

As the population ages and technology continues to advance, the need for healthcare and health organizations continues to grow. In the past, a sick person would go to the hospital to receive treatment. However, in recent years a shift towards preventative care has been seen where patients seek health services to prevent illness rather than waiting to seek treatment after it has occurred. Hospitals are still a great resource for receiving medical care ranging from emergencies and delivering babies, to simple procedures such as eye exams and blood tests. However, a second option of visiting out-patient clinics for preventative care and procedures is also available.

The shift to preventative care has contributed to the rising of patient numbers. As such, hospitals cannot handle the influx of patients and variety of procedures that need performing. To cope with this problem, primary physician and outpatient clinics arose to help decrease the number of patients being treated at hospitals. These physician and outpatient clinics allow people to receive routine care and procedures outside of the hospital setting. Since the increase of primary physicians and outpatient clinics, hospital stays have decreased. In fact, the average hospital stay is now only three days and outpatient visits have grown by as much as 200 percent over the past 25 years (Cosgrove, 2011).

While these numbers make it seem as if the amount of primary physician and outpatient clinics are growing, this is not the case. There has been a decline in the number of independent physician and outpatient clinics in recent years. According to an Accenture report, only one-in-three doctors will remain independent by the end of 2016 ("Many U.S. Doctors will Leave Private Practice for Hospital Employment, Accenture Reports." July 2015). Physicians have

begun to work for hospitals and other partnering organizations. From 2012 to 2014, the number of physicians who worked directly for a hospital or in practices that had at least some hospital ownerships increased from 29 percent to 32.8 percent ("Is private practice really giving way to hospital ownership?" 2015).

Healthcare regulation has helped to influence the changing structure of health organizations as well. Some healthcare workers have expressed concern about the effects regulation has on practices and healthcare clinics. Although this debate goes back decades, the issue recently became heightened after the introduction of the Affordable Care Act (ACA).

In 2010, before the passing of the Affordable Care Act, some physicians believed that the passing of the act would play a role in the decline of private physician practices and outpatient clinics. In a study conducted by *The Physician's Foundation*, a not-for-profit organization that provides grants to health organizations and surveys practicing physicians to examine health care issues affecting the U.S., four out of five physicians surveyed believed that one of the consequences of health reform would be the erosion of traditional, independent private practice, leading to the consolidation of private practices and the integration of practices with hospitals and other health organizations ("Health reform and the decline of private physician practice: A white paper examining the effects of the patient protection and affordable care act on physician practices in the United States," 2010).

Those in favor of the Affordable Care Act said that regulation is essential to providing patient care. In a letter to lawmakers, major hospital groups stated, "As organizations that take care of every individual who walks through our doors, both due to our mission and our obligations under federal law, we are committed to ensuring health care coverage is available and affordable for all," (Goodnough, Pear & Kaplan, 2017). These supporters believe that

affordable health care is essential to achieving the mission of their organizations and providing care for patients. Despite dissonance from both sides, healthcare regulation has forced health organizations to respond.

With hospitals having difficulty attending to the growing needs of patients, and more of those patients opting for outpatient procedures and primary care visits, hospital and health organizations can better meet patient needs by buying into primary physician and outpatient facilities. As for physicians, turning to work for hospitals allows them financial stability while allowing them practice flexibility outside of a hospital setting.

Clinic Model

Health organizations that have structured themselves under a clinic model are physician-led, combine education with practice and provide a variety of health services. Physician-led means that many organizational departments are led by physicians. For example, Carilion Clinic's Chair and Vice President of the Department of Emergency Medicine is Dr. John H. Burton, M.D. In addition to heading the department, Dr. Burton is a professor for the Virginia Tech Carilion School of Medicine (VTC). In the clinic model, physicians hold multiple roles in the organization at both the clinical and managerial levels.

Health organizations that structure themselves under a clinic model also combine education and practice. Notable health organizations that identify as clinics include the Mayo Clinic, Cleveland Clinic, Marshfield Clinic, and Carilion Clinic. Each of these organizations run or jointly-run medical schools associated with the organization. For example, Mayo Clinic runs the Mayo Clinic School of Medicine, with campuses located across the United States. Combining education and medical practice allows these organizations to develop new medical

technologies that bring attention to the organization and carryout practice to advance to the forefront of the industry.

Health organizations operating under a clinic model provide a combination of services across a variety of specialties that are not traditionally available to their patients. In a clinic-based system, a range of staff and specialist physicians are needed to service the various needs of patients. For example, Marshfield Clinic employs more than 700 physicians in 80 different medical specialties and is made up of over 1,200 hospitals, clinics, and other off-site facilities that provide medical care ("About Us," Marshfield Clinic, 2016). This example illustrates the need for a wide-variety of staff members to help a clinic-model healthcare organization operate. Carilion Clinic is one health organization that has adopted the clinic-model to provide better patient care, place an emphasis on medical education and research, and help with the expansion of the organization.

Carilion Clinic

Carilion Clinic is non-profit health organization based in Roanoke, VA. The clinic consists of seven hospitals and a vast network of primary and specialty physicians covering the Southwestern part of Virginia. In addition, Carilion partners with Virginia Tech to operate the Virginia Tech Carilion School of Medicine and Research Institute (VTC). With more than 12,000 employees, including almost 700 physicians, the clinic serves over one million Virginians and runs the region's only Level 1 Trauma Center ("About Us", Carilion Clinic, 2016).

Previously, Carilion Clinic (known formally as Carilion Health System) operated under the organizational values of respect, integrity, excellence, and people. Additionally, Carilion fostered what it calls a "culture of excellence". As of 2012, these values and culture of excellence had been in place for over ten years ("Executive Summary: Organizational Values",

Carilion Clinic, 2012). To foster this culture of excellence, Carilion believed there were several keys to success: physical environment, team excellence, resources, leadership, partnerships with those it serves, process simplification and accountability ("Executive Summary: Organizational Values", Carilion Clinic, 2012). A physical environment is one that is welcoming and safe. Team excellence is working together to support each other while offering encouragement. Resources include providing appropriate equipment and staff to meet patient needs. Leadership is one that encourages employees to achieve excellence. Partnerships with those we serve means viewing interactions with publics as an opportunity to achieve excellence. Process simplification refers to getting rid of obstacles that prevent timely delivery of care. Lastly, accountability means acting with responsibility and care for patients, fellow employees and the communities we serve. Carilion uses this culture of excellence to place greater emphasis on service excellence and incorporates related language on internal and external documents ("Executive Summary: Organizational Values", Carilion Clinic, 2012).

In 2006, the organization made the transition from health system to a clinic model as a result of strategic planning (Whitcomb, 2010). Trends in the healthcare sector threatened to undermine the organization's financial position. The goal of the reorganization was better coordination of patient care and an emphasis on medical education and research. Several years after the transition, Carilion decided to introduce a set of refreshed organizational values that better fit the recent evolution of the organization ("Executive Summary: Organizational Values", Carilion Clinic, 2012). The set of refreshed values were deemed the 5 C's: commUNITY, courage, commitment, compassion and curiosity.

Community is the first of Carilion Clinic's five "C" values. CommUNITY is defined as, "Working in unison to serve our community, our Carilion family and our loved ones," (Carilion

Clinic "About Us"). Carilion works to serve the needs of the community and improve the health of those that belong to it. Courage is the second of Carilion Clinic's five "C" values. Courage is defined as, "Doing what is right for our patients without question," (Carilion Clinic, "About Us"). Carilion employees show courage by asking questions and voicing their opinions for the benefit of patients. Commitment, the third of Carilion Clinic's five "C" values, is defined as, "Unwavering in our quest for exceptional quality and service," (Carilion Clinic, "About Us"). Carilion is committed to helping care for patients by hiring committed employees and staying up to date with the newest technology. Compassion is the fourth of Carilion Clinic's five "C" values. Compassion is defined as, "Putting our heart into everything we do for our patients every day," (Carilion Clinic, "About Us"). Carilion employees demonstrate compassion to make patient experience the best that it can possibly be. Curiosity is the fifth and final Carilion Clinic "C" value. Curiosity is defined as, "Fostering creativity and innovation in our pursuit of excellence," (Carilion Clinic, "About Us"). Carilion is focused on educating the community and furthering knowledge in the health field through research and development. The development of these new values aimed to better fit the new organizational structure and help to foster Carilion's culture of excellence.

Changes in the healthcare industry have forced health organizations to respond and improve to better serve patients. Competition for these patients between private practices and hospitals has forced healthcare organizations to respond in ways such as organizational re-structure. Carilion Clinic is an example of a health organization that has responded to the changing environment by re-structuring. This section has provided context for the reader to better understand the environment in which Carilion Clinic is operating and the organizational culture that operates within its walls. Relevant literature to the thesis will now be explored.

Chapter 3 Literature Review

The following literature review will introduce the theoretical foundation for the study and explore organizational culture, internal communications, and public relations as they relate to excellence. The study uses the excellence theory as a theoretical lens to explore the relationship between public relations and organizational culture at Carilion Clinic. Specifically, the excellence principles are used as a guide to evaluate Carilion's public relations and identify how they contribute to the organization's culture of excellence.

Theoretical Foundation

Excellence theory explains how public relations can contribute as a management function lending to overall organizational effectiveness (Grunig, 1992). As a management function, public relations works to effectively manage organizational relationships with publics, such as customers, employees, and members of the community in which the organization operates. For an organization to be effective, it must behave in ways that solve the problems and satisfy the goals of stakeholders as well as management (Grunig, Grunig & Dozier, 2006). This study uses excellence theory, specifically the excellence principles, combined with corporate culture perspectives as a lens to explore how public relations fosters organizational culture at Carilion Clinic. The study also seeks to identify if the principles of excellence theory are present that can help lead to excellence in an organization.

Peterman and Waters (1982) argued that eight common themes that they argued were responsible for the success of organizations; their study sparked the study of excellence and organizational success. Origins of excellence theory in public relations trace back to Grunig and Hunt's (1984) *Managing Public Relations* where the four models of public relations practice were first developed. Not long after, Grunig (1992) developed the excellence theory, which

became the first general theory of public relations. The excellence theory says that excellent

public relations is essential to making an organization excellent (Grunig, 1992). Since public

relations is responsible for managing relationships inside and outside of the organization through

strategic communication, it has the power to create and shape the image of the organization to

different publics. Excellence in communication is a characteristic of excellent organizations

(Grunig, 1992). Therefore, organizations with excellent public relations can also be excellent

organizations. Excellence is dependent on both internal and external public relations, however,

this study will focus solely on internal public relations.

Grunig (1992) provided 12 characteristics of excellence in communication management:

human resources, organic structure, intrapreneurship, symmetrical communication systems,

strong participative culture, strategic planning, social responsibility, support for women and

minorities, quality as a priority, effective operational systems and collaborative social culture.

Together these characteristics combine to provide a basis for establishing excellence in

communication management within an organization.

General principles of the theory were later developed following the *Excellence Study*

conducted by Grunig, Grunig, and Dozier (2006). The first of these principles is public relations

as a managerial function. Organizations with excellent public relations must classify public

relations as a distinctive, managerial function (Grunig, Grunig & Dozier, 2006). According to

this principle, public relations and communication managers must work closely with top

management to provide insight and feedback in the organizational decision-making process. By

doing so, public relations can bring the voices of an organization's internal and external publics

into the decision-making process. This allows for public relations to manage relationships with

various organizational publics. Lendingham (2003) also notes the importance of public relations

as a managerial function in the development of his relationship management theory. This theory suggests that balancing the interests of and organization and its publics can be achieved through relationship management (Lendingham, 2003). When public relations works closely with top management, it is better able to manage relationships with an organization's publics by contributing to the decision-making process. Excellent public relations communicate with various organizational publics to allow the voices of these publics to be heard when organizational decisions are made (Grunig, Grunig & Dozier, 2006).

The second principle of the theory says that top public relations practitioners must have experience in the technical and managerial functions of public relations (Grunig, Grunig & Dozier, 2006). This means that these top communicators should be labeled managers, and as such they should be involved with managerial decision-making as well as technical functions such as writing and researching. Functional responsibilities of public relations managers are formulating PR strategy, developing strategic PR plans with those responsible for campaign development, and to counsel organizational leaders on their communication responsibility (Steyn, 2007). These functions allow the public relations manager to work closely with top management and implement communication plans and programs that help to further relationships with organizational publics. By having experience in the technical functions of public relations, managers are better able to develop effective communication plans and programs. Desanto and Moss (2005) found a pattern of managerial and technical functions that public relations managers conduct on a daily basis, including planning, advising top management, liaising and networking with internal and external publics, and troubleshooting. Having public relations practitioners that are labeled as managers allow public relations to be seen as a managerial function and help public relations contribute to organizational excellence.

The third principle states that organizations with excellent public relations should have

an integrated communication function or function as a single department (Grunig, Grunig &

Dozier, 2006). Public relations should not be integrated into a department that does not specialize

in communication. Ideally, the department would stand alone or be integrated into a department

where public relations is not subsumed by the other communication function. At times, public

relations and marketing are seen to be integrated together, however, these two functions have

different organizational goals to fulfill and rely on different strategies to fill these goals (Dozier

& Grunig, 1992). The argument here is that public relations focuses on organizational image and

building relationships with various publics, while marketing is focused on the organization's

bottom-line and bringing in customers and selling products. These are two very different

functions and as such, public relations should not be overshadowed by marketing. Hallahan

(2007) notes that public relations activities are not only carried out by those who consider

themselves public relations practitioners. This suggests that integration with other

communication functions, such as marketing, can be beneficial for an organization. Therefore,

organizations with excellent public relations are either stand-alone or integrated with another

communication function, as long as public relations is not overshadowed or used as a tool by

another department.

The fourth principle addresses the use of two-way symmetrical communication by public

relations (Grunig, Grunig & Dozier, 2006). Public relations departments should focus on the

two-way symmetrical model of communication when developing and implementing programs

and plans for interacting with various organizational publics. Huang (2007) found in his study

that two-way symmetrical communication between an organization and its publics contribute to

public relations and organizational effectiveness by reducing the costs that result from conflict

and crisis and increasing public support for organizational efforts. Young and Post (1993) found

that commitment to two-way symmetrical communication with employees was a communication

characteristic that greatly improved an organization's ability to make large-scale changes.

Richmond (2011) also agrees that two-way symmetrical communication with employees is

important, she argues that this model of communication is one of the ways to a sustainable

leadership communication strategy. The use two-way symmetrical communication is a beneficial

practice for engaging publics and improving the image of an organization by facilitating open

communication with an organization. Providing feedback channels to facilitate two-way

communication allows employees to have a voice and communication with the organization.

        While the excellence theory suggest that two-way symmetrical communication is the

best model for engaging with publics, it does not state that this is the only possible model. There

are times when public relations may operate under other communication models, such as the

public information model, which focuses on one-way information dissemination. For example, a

health organization may want to announce the increased rate of certain illness in the community

and provide steps for how to prevent contracting the illness. In this instance, the organization is

not seeking to facilitate a two-way conversation about the illness, rather provide the public with

information on how to prevent it. At times, public relations may use a mix of communication

models, depending on the situation and public. For an organization to be excellent, public

relations should focus on symmetrical communication with publics to allow the voices from

various publics to be heard and addressed.

        Principle five says that excellent public relations departments constantly develop and

measure programs used to maintain relationships with their publics (Grunig, Grunig & Dozier,

2006). These programs should implement two-way communication and measure success of these

programs to ensure that the department is effectively communicating with various organizational

publics both internally and externally. Public relations measurement and evaluation in the first

half of the twentieth century focused on opinion polls and media analysis (Watson, 2012).

Measurement and evaluation traditionally focused on the number of mentions in the media and

opinions on how members of the public felt about the organization. As public relations practice

has evolved and technology has advanced, public relations measurement and evaluation has

changed as well. In 2010, the Barcelona Declaration of Measurement Principles was adopted as a

general approach to measuring public relations (Watson, 2012). These principles focus on the

measurement of goals and outcomes that public relations has strategically set beforehand.

Evaluation and measurement may focus on campaign pieces or entire communication programs

or plans, internally or externally. Excellent public relations uses evaluation and measurement to

help maintain relationships with various publics and support a favorable image for the

organization.

The sixth general principle of the theory states that excellent organizations exist in

environments where activism is present and organizations are forced to respond to and work with

different groups of activists (Grunig, Grunig & Dozier, 2006). Responding to and working with

activists allows organizations to use communication programs and maintain mutually beneficial

relationships with their publics. Activism comes from organizational publics that disagree with

the organization's practices, decisions, values, and beliefs. These activists can create trouble for

an organization and as such should be communicated with to negotiate a win-win situation for

both the organization and the activist public. Activism is usually present externally to an

organization but at times can also be internal. A group of employees who don't agree with an

organizational change and protest the organization can be considered activists just as a group of

the organization's customers can. Holtzhausen (2000) argues that public relations practitioners can help activists reach their goals and create alliances with organizations through their ability to communicate and organize. In this view, public relations can benefit the organization by working with activists to support mutual understanding and solve problems. Organizations with excellent public relations experience activism at times which allows for the practice of two-way communication and problem-solving that maintains a positive image for the organization. This does not mean that activism needs to be present at all times; rather suggests that organizations that experience activism have successful public relations as it allows them to practice two-way communication.

The seventh principle of the theory addresses organizational culture. Organizations with excellent public relations have a participative culture based on symmetrical internal communication and an organic structure that equalizes job opportunities and creates high job satisfaction (Grunig, Grunig & Dozier, 2006). Organizational culture that fosters togetherness, opportunity, and two-way communication can result in higher job satisfaction and work performance which positively influence an organization's image and reputation. Aldoory and Sha (2006) argue that diversity is important in excellent public relations. This allows for opportunity for women and minorities which bring different perspectives to the practice and help better communicate with various publics. Excellent public relations operates in an organizational culture that is open, supportive, and provides opportunities for women and minorities.

Support for the principles developed by Grunig, Grunig and Dozier's (2006) *Excellence Study* has been established in replications of the study (Rhee 1999; Wakefield, 1997; Wakefield, 2000; Wakefield, 2001; Vercic, Grunig & Grunig, 1996). Wakefield (1997) conducted a panel study evaluating how much public relations experts from 18 countries believed the excellence

theory principles were general principles that could be applied in their respective countries. It was found that there was consensus among the experts that all the principles except diversity could be generically applied and used in the different countries (Wakefield, 1997).

The *Excellence Study* was replicated in South Korea and resulted in a list or principles similar to those seen in the original study (Rhee, 1999). Vercic, Grunig and Grunig (1996) found when replicating the study in the country of Slovenia that the principles developed by Grunig, Gruning and Dozier (2006) were the same as well. However, it was noted that the way these principles were applied in different cultures varies from country to country (Vercic, Grunig & Grunig, 1996). Results from the replicated studies suggest that the principles of the excellence theory can be applied and used universally across countries and cultures.

While replicating the *Excellence Study*, scholars extended the theory by adding another generic principle, ethics (Vercic, Grunig & Grunig, 1996). As this additional principle has not been extensively tested, the current study will not include the principle of ethics.

Grunig, Grunig and Toth (2007) challenge researchers to continue theory-building that will lead to the understanding of how public relations management contributes to organizations and society. This study seeks to contribute to this understanding by uncovering public relations efforts and tactics that help contribute to organizational culture and the overall internal success of organizations.

Criticisms of Excellence Theory

With support for the excellence theory also comes criticism. The theory has been questioned for its reliability and validity (Leichty & Springston, 1993) and applicability in real-world public relations (Murphy, 1991; Dover, 1995; Leichty, 1997; Cancel, Cameron, Sallot & Mitrock, 1997; Gregory & Halff, 2013; Coombs & Holladay, 2015). Changes in public relations

practice have also created criticisms for the theory (Hallahan, 2007;). The brunt of criticism

focuses on the use of the two-way symmetrical model as a public relations strategy.

Cancel, Cameron, Sallot and Mitrock (1997) offer the contingency theory of

accommodation as an alternative to the excellence theory. The theory holds that there is a

continuum for appropriate public relations practice depending on the situation and public that an

organization is communicating with, placing advocacy on one end and accommodation on the

other. True excellence in public relations results from selecting a point on the continuum that

best fits the current need of the organization and its publics, then developing tactics around that

point (Cancel, Cameron, Sallot & Mitrock, 1997). In this view, two-way symmetrical

communication is an accommodative strategy and therefore is not appropriate for every situation

or public.

Murphy (1991) argues that few public relations departments practice two-way

symmetrical communication and instead use a combination of asymmetrical and symmetrical

strategies. Dover (1995), in a more critical review of excellence theory, states that the two-way

symmetrical model of communication does not work well in the real world of public relations

practice. Leichty (1997) agrees that collaborative or accommodative public relations is

unfeasible in some situations. At times, asymmetric public relations efforts may be necessary

when dealing with publics. Opponents are not always reasonable and sometimes public relations

efforts are reactive, therefore symmetrical two-way communication and accommodation will not

be beneficial to the organization or its publics (Leichty, 1997).

Macnamara (2009) found that public relations practice is grounded in one-way, top-down

communication. Even with the growth of technology that makes two-way communication easier,

one-way communication seems to dominate public relations practice. This furthers the criticism

that two-way symmetrical communication is not applicable in the real-world of public relations.

Coombs and Holladay (2015) argue that personal relationships with an organization

cannot exist, and therefore mutually beneficial relationships between an organization and a

public are not possible. In this view, two-way symmetrical communication is not beneficial for

an organization as it cannot hold a personal relationship with a public and share all the same

goals, values, and beliefs.

Two-way symmetrical communication between and organization and its publics suggests

that power is distributed and equal (Gregory & Halff, 2013). However, organizations are seen as

powerful and able to influence publics and regulation to align with their interests. This criticism

of excellence theory suggests that power plays a role in public relations practices and that

symmetrical communication allows power to be distributed to the publics, which is often not the

case as the power lies within the organization.

Hallahan (2007) argues that the emergence of integrated marketing communications and

its growth go against support for public relations being structured as a stand-alone department.

Organizational communication has become integrated to better support strategic organizational

planning. This way, communications are synchronized across an organization and work together

to support strategic goals. The excellence theory states that public relations should stand alone or

be integrated within a department that focuses on communication, however, Hallahan (2007)

states that this view dismisses the fact that relationship-building and strategic communication are

practiced across the entire organization.

These criticisms all point to the lack of applicability of the excellence theory in real-

world contexts. Criticisms of the theory focus more on the two-way model of communication

and less on the other principles of excellent public relations as described by Grunig, Grunig and Dozier (2006). Nevertheless, many scholars agree that two-way symmetrical communication in an organization's public relations is the ideal form of communication (Leichty, 1997; Murphy 1991).

Organizational Culture and Excellence

The final principle of excellence theory addresses the importance of an organizational culture built on participation and two-way symmetrical communication. As the study seeks to explore how excellence in public relations contribute to organizational culture, relevant literature involving organizational culture is presented.

Schein (2004) defines organizational culture as, "patterns of shared basic assumptions that was learned by a group as it solved its problems of external adaptation and internal integration, that has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems" (p.17). This view of organizational culture says that members adopt basic organizational assumptions, such as values and beliefs, through stories, rituals, and experiences to help adapt and integrate into a culture.

As a medical education and practice organization, Carilion Clinic's organization culture may differ from traditional organizations. Carilion Clinic experienced a large organizational structure change from health system to clinic model and a new set of organizational values were adopted after the change to better fit the re-structure. These changes can affect culture and how it is created or fostered within and organization.

Martin (1992) describes three dominant scholarly perspectives in organizational culture research: integration, differentiation and fragmentation. Each of these perspectives focus on

organizations and the culture that is created within them. Integration research focuses on the

consensual understanding in organizational culture. Differentiation focuses on inconsistencies

throughout organizational culture and the subcultures that may develop because of these

inconsistencies. Finally, fragmentation research focuses on ambiguities and the multiple

understandings that may arise in organizational culture. Together, these three bodies of research

look to understand how organizational culture is created, understood and shaped.

When it comes to the shaping of organizational culture, research can be narrowed to

another three broad perspectives: practical, interpretive and critical/postmodern. The practical

view states that, "culture is an organizational feature that managers can leverage to create a more

effective organization," (Eisenberg, Goodall & Trethwey, 2010, p.113). In this view, culture can

be, and is, shaped by management. Cameron and Quinn (2005) agree that organizational can be

managed and even changed. In their book, the authors provide a framework that can be used by

organizational managers to facilitate an organizational culture change. Schein (2010) argues that

culture can be managed as well and that leadership is the main source of culture change. The

practical view of organization culture says that culture can be managed and that organizational

leadership has the power to make the change happen

The interpretive view states that, "culture is too complex to be leveraged, managed or

controlled," (Eisenberg, Goodall & Trethwey, 2010, p.116). In this view, culture emerges from

the organization and cannot be managed. Some scholars believe that organizational culture can

and does change, however, not at the hands of management (Ogbonna, 1993; Legge, 1994). This

interpretive view doesn't argue that culture cannot be changed, rather argues that change cannot

be brought on by management. Changes in organizational culture emerge from within the

organization itself and the employees that operate within the culture.

The critical/postmodern view of organizational culture states that, "corporate interests frame the culture and aspects of an organization's daily operations," (Eisenberg, Goodall & Trethwey, 2010, p.120). In this view, culture cannot be managed and instead focuses on how power relationships and status quo shape culture in an organization. Hallett (2003) says organizational culture results from a negotiated order and interactions between those with and without power. Zheng, Yang and Mclean (2010) found that knowledge management can impact and influence organizational culture. In this instance, management was seen to create knowledge for employees that helped to leverage organizational culture. This critical/postmodern view of organizational culture demonstrates how power within an organization has control over culture.

As demonstrated by the previous literature, the study of culture within organizational communication is very broad. However, it is clear throughout the literature that organizational values play a role in organizational culture. Deal and Kennedy (1982) were among the first researchers to develop a cultural model of organizations. In their model, the basis of organizational culture consists of six elements; history, values and beliefs, rituals and ceremonies, stories, heroic figures and the cultural network (Deal & Kennedy, 1982). Organizational culture can be seen to emerge from members' individual and collective symbol-using practices (Eisenberg, Goodall & Trethwey, 2010). This means that organizational culture is a collective of metaphors, rituals, stories, artifacts, values, etc. held by organizational members that combine to create an organization's culture. Two-way symmetrical communication by public relations can play a role in developing organizational culture. By communicating values, metaphors and stories while allowing employees to respond with interpretations and feedback, public relations can help to communicate and foster organizational culture.

Kotter and Heskett (1992) also stress the importance of values in an organization and how value consensus can lead to enhanced organizational performance. Collins and Porras (2002) suggest that organization longevity can be sustained by the preservation of core values while being open to change. Gibson and Papa (2000) found in their study of blue collar workers that communication of organizational values among employees helped to better assimilate new employees into an organization through what they termed *organizational osmosis*. In this instance, values held by employees were also those held by management. Therefore, these values were easily adopted by employees to create the organizational culture in which they resided.

Knottnerus, Usperger, Cummins and Osteen (2006) found that ritualized symbolic practices, such as value beliefs and communication, can help to guide employees to make decisions. As seen in the previous research, communication of organizational values can help to foster organizational culture that leads to the enhancement of an organization's performance. Two-way symmetrical communication can help to establish organizational value meaning within an organization and allows for feedback to be received on the interpretation of organizational values. As seen with the example of organizational osmosis, the successful communication of value meaning can help integrate employees into an organization as well as adoption of organizational values.

Peters and Waterman (1982) were the first to note the importance of organizational culture in excellent organizations. According to the researchers, culture should be strong and participative and organizational values should come from organizational culture (Peters & Waterman, 1982). In other words, values should be developed from the culture that has been established within an organization. Grunig (1992) also noted the importance of a strong, participative culture within organizations. According to him, "Cultures should stress integration,

participation and collaboration as central values," (Gruning, 1992, p. 237). Grunig, Grunig and

Doizer (2006) further echoed this importance during the development of the excellence theory

principle that states organizations with excellent public relations have a participative

organizational culture. When organizational culture is participative and allows employees to feel

as if they have a voice, greater employee satisfaction and performance can result, leading to a

more positive organizational reputation and image.

Research has shown that when organizational values and employee values align,

employee satisfaction, commitment and performance increase (Fitzgerald & Desjardins, 2004).

When values between and organization and their internal publics align, a stronger relationship

between the two results as employees identify more closely with the organization itself.

Employee relations can be enhanced through an organization's mission, vision, values and its

communication of them (Heath, 2005). When organizations successfully communicate and

commit to their mission, vision and values, they are able to foster and influence an organizational

culture that incorporates their values.

Meng (2014) found that organizational culture generates a direct, positive affect on the

achievement of excellent leadership in public relations. Excellent leadership in public relations

can also influence organizational culture by re-shaping it in a favorable way that supports public

relations efforts within an organization (Meng, 2014). By adhering to the excellence principles,

public relations can contribute to organizational culture by communicating organizational value

meaning. When employees share a mutual understanding on value meaning, they can better

exhibit the culture that is being fostered by public relations.

As noted by the above literature, organizational values help to influence and foster

organizational culture through two-way symmetrical communication within an organization. A

strong, participative organizational culture and two-way symmetrical communication are both principles of the excellence theory. As values help to foster organizational culture, it is possible Carilion's 5 C values and their manifestations in internal communication contributes to organizational excellence.

Internal Communication, Public Relations and Excellence

Although traditional public relations focuses on relationship management with external publics, it is important to manage relationships with internal publics as well. Internal publics can be considered more than just employees of an organization; they are marketers, media liaisons, and sometimes even customers. Arthur Page was one of the first public relation practitioners to note employees as a public. Page stressed the importance of keeping employees informed and stated that mass media was insufficient in achieving this, therefore, public relations were responsible for keeping employees informed (Griese, 2001). Employees can allow an outsider a glimpse of an organization from an internal point of view. This heightens the importance for organizations to develop and execute strategic internal communications. The study focuses on the internal public of employees to analyze organizational value congruence that in turn affects organizational culture. Since employees are the foundation of organizational culture, relevant literature concerning internal communication, public relations and excellence is presented.

The inclusion of internal communication in definitions of public relations can be seen at least as early as 1984. Grunig and Hunt (1984) defined public relations as the management of communication between an organization and its internal and external publics.

Sriramesh, Grunig and Dozier (1996) see public relations as a communication activity and state that, "Communication is one of the ways in which organizations develop and maintain their cultures," (Sriramesh, Grunig & Dozier, 1996, p.238).

Welch and Jackson (2007) also believe that internal communications are a variable of public relations. In the development of their internal communication matrix, the researchers see internal communication positioned within organizational communication, or in different terms, strategic public relations (Welch & Jackson, 2007).

Allowing publics to have a voice can strengthen organizational culture as it allows them to actively participate. As a result of the *Excellence Study*, Grunig, Grunig and Dozier (2006) developed one principle of the excellence theory to focus on symmetrical, integrated communication. Internal communication can be essential to shaping organizational culture. Symmetrical, two-way communication inside an organization helps to build a participative culture where employee voices are heard within an organization (Grunig, Grunig & Dozier, 2006). Employee feedback programs that employ two-way symmetrical communication give voice to employees in decision-making, allowing for employees to be heard by management.

In their study of organizational culture and its relationship to public relations, Sriramesh, Grunig and Dozier (1996) found that excellent public relations is most likely to be found in an organization with a participatory culture. It was found that a participatory culture correlated with symmetrical internal communication and organic structure; both of which are principles of excellence.

Based on the literature presented above, the following research questions are presented:

RQ1: Are principles of the excellence theory present in Carilion Clinic's internal public relations?

Public relations that utilize excellence principles can contribute to the overall success of an organization (Grunig, 1992). Excellence principles include public relations as a managerial function, having experience in managerial and technical functions, being an integrated

communication function, using two-way symmetrical communication, constantly developing and measuring public relations programs, having activism present and the presence of a participative organizational culture. By identifying the principles of excellence theory present in Carilion Clinic's public relations, the relationship between the principles and how they contribute to organizational culture can be explored.

RQ2: Are Carilion Clinic's organizational values manifest in internal communications, specifically the *Wow Wall*?

Carilion Clinic's *Wow Wall* (located on the employee website) gives employees a place to recognize others for demonstrating organizational values. Here, employees can share experiences they have witnessed where others have demonstrated organizational values. Excellence in public relations influences organizational culture and vice versa (Meng, 2014). Congruent values between an organization and its employees contribute to greater employee satisfaction and performance (Kotter & Heskett, 1992; Fitzgerald & Desjardins, 2004). Since organizational values and excellence in public relations play a role in fostering organizational culture, the organization's intended interpretation of organizational values and employee interpretation of organizational values should be congruent. By analyzing the posts on the *Wow Wall*, congruency of organizational values between the two can be evaluated and manifestation of values in internal communications can be determined

RQ3: Do Carilion Clinic's public relations efforts contribute to the organization's culture of excellence?

Strong, participative cultures and a symmetrical model of communication help to result in excellent public relations (Grunig, Grunig & Dozier, 2006). Public relations contribute to the fostering of organizational culture by communicating organizational values and beliefs.

Identifying excellence principles in Carilion Clinic's public relations and analyzing how these

principles and organizational values are manifested in internal communications allows for an

explanation of how the organization's public relations contribute to the fostering of Carilion's

culture of excellence.

Chapter 4 Method

To explore how public relations contributes to organizational culture at Carilion Clinic, the study uses the excellence theory and its principles as a theoretical lens to help guide evaluation of the organization's public relations. The first part of the study consisted of interviews with the Carilion Clinic *MarCom* team. *MarCom* is the integrated marketing and communications department at Carilion Clinic where public relations operates. Interviews probed *MarCom* employees for the presence of excellence principles in internal public relations practice. The second part of the study looked to Carilion Clinic's internal communications to analyze organizational value congruency between the organization and its publics. This allowed for an evaluation of public relations efforts and tactics that help to foster Carilion Clinic's culture of excellence. A constant comparative method was used to analyze posts on Carilion Clinic's *Wow Wall* for value congruency. The *Wow Wall* can be found on Carilion's employee website and allows for employees to submit recognition for co-workers who have gone above and beyond as Carilion Clinic employees, all of which, "were caught living the Carilion Clinic values" (Carilion Clinic, Wow Wall).

Procedure

To identify which principles of the excellence theory are present in Carilion Clinic public relations internal practices, in-depth interviews with the Carilion Clinic *MarCom* team were conducted. A semi-structured approach was employed by beginning with open-ended questions and then proceeding to specific questions that attempted to probe for the principles of excellence theory that may be present in the organization's public relations. Questions for these interviews (see appendix) were developed directly from the main principles of the excellence theory. Interviews were conducted face-to-face in a location convenient to the participants and lasted

about 20-30 minutes each. Participants were informed that the interview would be recorded, their responses kept confidential, and that quotes from responses may be used in the study. Participants then read and signed an informed consent letter which was then collected by the researcher.

Interviews were transcribed using the Google speech-to-text program, *Transcribe*. The transcription was then double-checked by the researcher by playing back the audio and ensuring that no errors were made by the speech-to-text program.

A general inductive approach for analyzing qualitative evaluation data (Thomas, 2006) was conducted to identify the presence of excellence principles in Carilion Clinic's public relations practices. Data analysis was guided by the research questions to help identify themes of excellence principles that were present in the interviews. This method was used as the study doesn't seek to produce theory, but rather to develop findings and produce an evaluation of Carilion Clinic's public relations.

The second part of the study seeks to identify the manifestation of organizational values in Carilion Clinic's employee website and internal communications content, specifically Carilion Clinic's *Wow Wall*.

When adding to the *Wow Wall*, employees are required to select the organizational value that has been demonstrated by the employee receiving the recognition. Posts are available to all employees and can be sorted by the value demonstrated. By clicking on a post, employees can read stories stating how an employee demonstrated the value being recognized.

Posts were analyzed to determine if the experience provided by employees was congruent with the organizational value that was chosen. Identifying the congruency between what employees feel the organizational value means and what the organization intends the value to

mean, allows to determine manifestation of organizational values in Carilion's internal communications content.

Carilion Clinic's *Values Pledge* was used as a guide to help identify manifestation of values during the analysis (see appendix). The *Values Pledge* lists each of the 5 C values and provide examples that show how employees pledge to uphold each specific value in their jobs. Post content was then compared to the *Values Pledge* to determine if actions from the post aligned with manifestation of values according to the *Values Pledge*.

Throughout the process, the constant comparative method (Glaser, 1965) was employed to determine the number of *Wow Wall* posts that would be analyzed. Boieje (2002) adapted the original method to analyze qualitative interviews in his study on multiple sclerosis patients and their spousal care providers. His process was adopted for the current study as *Wow Wall* posts contain responses from employees similar to responses that would be given during an interview. The constant comparative method (CCM) allows for the comparison and contrast of *Wow Wall* posts and was able to determine value congruency by constantly comparing previous posts. The analysis started by looking at five posts from each organizational value category. If the five posts analyzed indicated that employees and the organization were congruent on the manifestation of the value, the next value category was analyzed. If one of the five posts did not support congruency between the employees and the organization, three more posts were analyzed in that category. If any of the additional posts did not support congruency, it was determined that the value was not concretely congruent between employees and the organization.

Participants

Three members of the Carilion Clinic *MarCom* team were interviewed in the first part of the study. *MarCom* is the title Carilion Clinic uses for its marketing and communications

division in which the organization's public relations operate. Participant roles ranged from

management positions, such as Senior Director of Marketing and Communications, to entry-level

positions such as Public Relations Specialist. These participants were chosen as excellence

because theory states that public relations contribute to the overall excellence of an organization.

Interviewing members of the public relations and communications team allowed for deeper

insight as to how public relations function within the organization and helped to reveal the

excellence theory principles that were present in Carilion Clinic's public relations. Participants'

interview responses will be label A, B and C to help keep identities confidential.

Artifacts

The second part of the study involved investigating Carilion Clinic's internal

communications content, specifically Carilion's *Wow Wall*. A systematic sampling method was

used to analyze every fourth post beginning from January 1, 2017. If five posts since January 1,

2017, were not available, the sample started with the most recent post for the category and

worked backwards by looking at every 4th post until enough posts were analyzed. This also

helped to determine which values were not being recognized as frequently. The constant

comparative method (Glaser, 1965) was employed to determine the total number of *Wow Wall*

posts that were analyzed. A total of 34 posts were reviewed throughout the analysis process.

Posts were analyzed multiple times by the researcher to ensure the validity of the congruency of

value manifestation between the organization and employees.

Measures

Excellence Principles

To uncover the excellence principles present in Carilion Clinic public relations, in-depth

interview questions probed employees to identify the principles that were present.

The first principle of the excellence theory states that public relations must be a managerial function and that senior communicators must be involved with upper level management in the decision-making process. Potential indicators of the presence of this principle included interviewees stating that senior communicators have direct contact with upper level management and that public relations managers are present at top-level management meetings. An example indicator of the presence of this value would be a Carilion Clinic public relations employee stating that they work with top-level management regularly.

The second principle says that top communicators must have experience in both technical and managerial roles. To measure presence of this principle, potential indicators were public relations managers taking on technical functions such as writing and researching, as well as managerial functions such as decision-making and planning. Another potential indicator was that top communicators held the title of manager. An example indicator would be statements from management interviewees saying that they produce communications such as media pitches and news stories.

Principle number three says that public relations should either be a stand-alone department, or one that is integrated with a similar department that does not merely use public relations as a tool. Potential indicators for the presence of this principle were employees indicating that the department is standalone or is integrated into another department where it functioned separately and not as a supporting tool. An example indicator would be interviewees stating that public relations operate within another department and work in unison with that department to help manage relationships.

The fourth principle states that excellent public relations use a two-way symmetrical model of communication when communicating with various publics. Potential indicators for the

presence of this principle included the interviewees indicating the use of two-way

communication between senders and receivers, the presence of employee feedback programs, as

well as outlets for employees to voice their opinions. An example indicator would be

interviewees talking about communication channels that allow for a two-way flow of

communication between the organization and employees.

Principle five says that excellent public relations develop and consistently measure

programs used to maintain relationships with their publics. Potential indicators of this principle's

presence in Carilion's public relations are the use of specific communication plans for internal

publics versus external publics and a direct measurement used to constantly measure the success

of these plans. An example indicator of the presence of this principle would be interviewee

responses that share measures used to evaluate public relations efforts.

The sixth principle of the excellence theory says that excellent organizations exist in

environments where activism is present. In other words, activism stimulates excellence (Grunig,

Grunig & Dozier, 2006). Potential indicators of the presence of this principle included the

presence of activism in the organization's community. Activism comes from organizational

publics that disagree with the organization's practices, decisions or values and beliefs and voice

that opinion publicly. Activists may be present internally and externally to an organization. An

example of these indicators would be interviewees talking about a group of employees that were

unhappy with an organizational change and voiced that opinion to either the public or

management.

The final principle of the excellence theory deals with organizational culture.

Organizations with excellent public relations have a participative culture with symmetrical

internal communication and equalize opportunities for employees. Indicators of the seventh

principle included employee participation in the shaping of organizational culture and development of the 5 C values. Other indicators included the presence of employee programs that allow for opportunity and symmetrical communication between public relations and employees. An example of these indicators would be interviewees talking about feedback channels and tactics that public relations uses to allow employees to have a voice.

Value Manifestation and Congruency

To analyze the ways in which Carilion Clinic's internal communications are manifesting organizational values, the researcher looked to the *Wow Wall* to identify congruency of organizational values between the organization and employees. During the analysis, the *Values Pledge* (see appendix) was used to develop the indicators for value congruency as seen below.

When identifying the manifestation of the value of commUNITY, potential indicators included mentions of the Carilion mission ("To improve the health of the communities we serve"), support and collaboration with coworkers and being actively involved with the community.

The value of courage was identified with potential indicators such as speaking up when a physician knows something is unsafe or should be changed, supporting teamwork and success and doing what's best with the patient and organization in mind.

Commitment was identified using potential indicators such as giving an exceeding amount of effort, doing things beyond the employee's own responsibilities, and providing an excellent experience for patients with a positive attitude.

When identifying the manifestation of the value of compassion, potential indicators included statements about showing care for patients and employees, making others feel valued and appreciated, and mentions of diversity and inclusion.

Identifying the manifestation of curiosity included indicators such as asking questions, incorporating education into work, and looking for ways to improve care.

While identifying the manifestation of organizational values by employees, the researcher looked for any of, but not limited to, the potential indicators listed above that arose from *Wow Wall* posts.

Chapter 5 Results

Interviews with Carilion Clinic's *MarCom* team allowed for deeper insight into how public relations operate within the organization. A general inductive approach for analyzing qualitative evaluation data was chosen to analyze interview responses as it allowed for the identification of excellence principles and for evaluation of adherence to them by Carilion Clinic public relations internal practices.

The second part of the study seeks to determine if organizational value meaning is congruent between the organization and its employees. Using the *Wow Wall*, posts from employees were analyzed and compared with Carilion's *Values Pledge* to determine whether employees held the same value meaning as intended by the organization. The constant comparative method allowed for the researcher to determine the amount of posts to be analyzed for congruence. This method worked to ensure that value meaning held by employees was indeed congruent across posts. In the following section, an analysis based on the guiding research questions is presented.

RQ1

RQ1 asks are the principles of the excellence theory present in Carilion Clinic public relations internal practices. To be considered excellent, all the excellence principles do not need to be present within an organization's public relations. It is enough to state that an organization's public relations can be considered excellent if more than half of the principles are present. As public relations varies among organizations, some principles may not exist within an organization or at any given time. As seen in Table 1, interviews with the public relations team reveal that five of the seven excellence principles are in practice in Carilion public relations.

The first principle of excellence theory states that public relations should be a managerial function. Public relations should work closely with top management and be involved in the decision-making process. All interviewees stated that they work directly with the organization's top management daily. All felt that their input on organizational decision-making was highly valued by management. Management-level interviewee A stated, "I would say that our input and how it is received is favorable. I believe that if I absolutely thought something was a bad idea, that would be taken into consideration. If I absolutely thought something was a good idea, then that would be taken very seriously as well." Interviewee C at the public relations specialist level stated that they were directly involved with top-level management as well. "Even at the specialist level I have been able to have a working relationship with the C-Team and I feel like I am playing a role there." Being involved with top-level management and interviewees believing that public relation's input is valued serves as evidence that the first principle of the excellence theory is present Carilion Clinic public relations.

Table 1: Presence of Excellence Principles in Carilion Clinic

Excellence Principles	Present in Carilion's PR
1) Managerial Function	Yes
2) Experience in Managerial & Technical Functions	Yes
3) Integrated Communication Function	Yes
4) Two-way Symmetrical Communication	Yes
5) Constant Development & Measure of PR Programs	No
6) Activism Presence	No
7) Participative Culture	Yes

The second principle of the excellence theory states that public relations should possess technical and managerial functions. Top communicators should carry the title of manager, be involved with top-level management, and still carry out technical functions such as writing and researching. Carilion's top communicator on the public relations team holds the title of public relations manager. This public relations manager meets regularly with top-level management and

carries out day-to-day technical functions such as writing, employee communications and media

relations. Management-level interviewee B mentioned what he says to reporters when he meets

with them to conduct media relations, "We always tell reporters when they are new to town, you

will hear this (the values and mission of Carilion) out of everybody's mouth." With this example,

we can see that public relations management is also involved in day-to-day technical functions

such as media relations. It should be noted that there are only two employees in the *MarCom*

department that specialize in public relations. With this being the case, it is essential that the

public relations manager assist in these technical functions due to the large size of the

organization. Carilion public relations meets the second principle of the excellence theory by

having a public relation's manager who participates in managerial and technical functions.

Principle three of the excellence theory states that public relations should be integrated

with a department that specializes in communication or function as a standalone department.

Within Carilion Clinic's organizational structure, public relations falls within the *MarCom*

department, which stands for marketing and communications. Being integrated with a

department that focuses on communication allows for public relations to operate as more than

just a support tool. Interviewee B stated, "We have a centralized communications department,"

and elaborates further on the structure of the *MarCom* department by stating that

"communications are coordinated." The public relations staff at Carilion coordinates with other

communication efforts, such as marketing, to develop and implement various campaigns and

communications. Here public relations is seen as being integrated into the organization's

communication function rather than being used as a to support another department.

Management-level interviewee A stated in an interview that they are involved in several

areas of communications and work closely with the rest of the department, "I am the director of

that area (employee communications) so I am very involved. I have several areas that I am responsible for but employee communications are one of them." This supports the evidence for the integration of public relations into a department that specializes in communication as the manager is responsible for several areas in the department. Carilion public relations is integrated into their *MarCom* department that functions to communicate with internal and external publics. As seen from the interviews and the structure of public relations, principle three of the excellence theory is present in Carilion public relations.

The fourth principle of the excellence theory describes the use of two-way symmetrical communication with various organizational publics by public relations. Interviews suggest heavily that this principle is present in Carilion Clinic public relations. When asked to describe the communication used with employees, interviewees used words such as conversational, open and straight-forward. Two-way symmetrical communication allows for dialogue between the sender and the receiver. As so, the word "conversational" can be synonymous of two-way communication.

Throughout the interviews, various types of feedback channels for employees were mentioned. All Carilion computers have numbers to different telephone feedback lines for things such as quality, risk and integrity on their desktops screens. A communication program that supports two-way symmetrical communication is *Carilion Ideas Hub*. This feedback channel allows employees to post ideas and suggestions to a forum that can then be voted upon by colleagues. Once an idea receives support from other employees, the idea or suggestion is then brought to management and may be acted upon. "*Carilion Ideas* gives people some autonomy and power to change the way they do everyday things to help make the organization a better place to be as a patient, as an employee, etc.," stated interviewee B.

In addition to this feedback channel, mentions of smaller channels such as Facebook and the employee website, *insidecarilon.org*, are also used by employees and monitored by the public relations team. "Employees can also always feel empowered to reach out to Nancy, our CEO, directly. Feedback doesn't always have to filter up the chain of command, it can come from any direction," interviewee B mentioned. From the multiple feedback channels available to employees and how this feedback is received by top management, there is presence of principle number four in Carilion Clinic public relations.

The presence of principle number seven in the organization's public relations received the most support from interviews. This principle says excellent public relations operates in organizations with participative cultures. Mentions of two-way symmetrical communication and an open, supportive, team-based culture appear throughout interviews. Carilion provides multiple channels and methods for highlighting individuals who exhibit the organization's values as well as those who show a sense of team-work and excellence. With Carilion Clinic being a largely spread out health organization, some members of the organization reside more than 50 miles away from the organization's headquarters. Interviewees echo each other in terms of the commitment to the inclusion of all Carilion locations throughout communications. Interviewee C stated, "We make a point not to just be Roanoke-centric, especially when we are dealing with employee communications and news stories highlighting the different kinds of work our employees do." This speaks to the priority that Carilion takes in making employees feel included and fostering togetherness. Interviewee A stated, "We strive to be inclusive of all areas of the system, but sometimes it's not always easy because a lot is happening in our Roanoke locations." From interviews, it is clear that Carilion Clinic public relations takes priority in fostering a team-based culture throughout their communications, especially with employees.

Interviews offer some support for the presence of the two remaining excellence principles in Carilion Clinic public relations. However, not enough support is generated to explicitly state that these principles are fully present.

The fifth principle of the excellence theory says that excellent public relations constantly develop and measure programs to maintain relationships. Additionally, this principle mentions the importance of implementing two-way symmetrical communication throughout these programs. Through interviewee responses, a theme of constant goal and program changing appears. Carilion Clinic public relations team mentioned things such as the shifting of broad themes and goals throughout their communication plans. Management-level interviewee B stated, "There are broad themes that we try to work with for employee communications and those shift from year to year depending on what the strategic objectives of the organization are." From this statement, it can be assumed that the team employs measures to monitor the success of communication programs and campaigns. However, without explicit support from interviews, the presence of this principle in Carilion Clinic public relations cannot be confirmed.

Principle six says that excellent public relations operate in an environment where activism is present. Activism warrants response from an organization and should strengthen relationships with publics by having to respond to them. Interviews show some support for the presence of this principle, but as with principle number five, it is difficult to explicitly state that this principle is present in Carilion Clinic public relations. Interviewees mention that there was pushback from some publics when the new organizational values were brought into place. When talking about the ways the organization communicates with its publics interviewee A stated, "The other side of it is more change management, helping people accept changes that may not always be easy at first." This demonstrates that public relations does experience activism with

internal publics. As such, support can be drawn for the presence of activism in Carilion Clinic

public relations since there was a group of employees who were not happy with change and

voiced their opinion to management, but without explicit statements from interviewees about

activism, the presence of principle number six cannot be concretely confirmed.

RQ2

 RQ2 asks are Carilion Clinic's organizational values manifested in internal communications,

specifically the *Wow Wall*? As seen in Table 2, analysis of *Wow Wall* posts reveal that three of

the five organizational values are congruent between the organization and the employees,

suggesting partial manifestation of organizational values in Carilion Clinic public relations

internal communication.

Table 2: Carilion's Five Organizational Values and Value Congruency on Wow Wall Posts

Organizational Value	# of Congruent Posts	% of Congruent Posts
CommUNITY	5/5	100%
Courage	5/8	62%
Commitment	7/8	87%
Compassion	5/5	100%
Curiosity	5/8	62%

Seven out of the eight posts analyzed demonstrate congruency for the value meaning of

commitment between the organization and employees. *Wow Wall* posts demonstrating this value

show employees' willingness to go above and beyond responsibilities and duties, put the patient

first and make the organization a better place. One post was written to thank co-workers who

went outside the scope of their responsibilities to assist another department on a day where there

was an influx of patients. Another post recognized the commitment by one team to provide

"exemplary care, compassion and skill to injured patients." From these examples, it can be seen

that employees see commitment as doing things beyond one's own responsibilities. A third post

shows one employee's demonstration of commitment as providing an excellent experience for

patients, "Despite the recent loss of a loved one, (employee name) makes each patient's dental visit a positive one. She works hard and not only does her job, but can be counted on by her co-workers to help out when a co-worker is overwhelmed." *Wow Wall* posts for the organizational value of commitment show that the employees share the same meaning for the value as the organization has intended as per the *Values Pledge*.

All the posts analyzed for the organizational value of commUNITY demonstrate congruency of value meaning between the organization and employees. Posts show employees support for and collaboration with other employees, as well as commitment to the improvement of the health in their communities. One post recognized a Roanoke-based employee who traveled an hour outside of Roanoke to assist another Carilion employee with a difficult medical procedure, "(employee name) traveled to New River Valley Medical Center (NRV) for a very difficult case and coordinated with (employee name) on-site with NRV." This post exemplifies that the employee recognized the value of commUNITY being demonstrated as this physician was willing to collaborate with another physician to complete a procedure in a different region. Support and collaboration with coworkers is one of the ways commUNITY can be demonstrated according to Carilion's *Values Pledge*.

Another post for the value of commUNITY was written to thank an employee who came in on New Year's Day to help cover lunch breaks for others, "Thank you, (employee name), for coming in to recover patients with us in main PACU on New Year's Day. Without you, we would not have had lunch breaks! As soon as you walked in, everything just calmed." This post again demonstrates support and collaboration with coworkers. An additional post mentioned employees being actively involved with the community, "March is National Nutrition Month and employees who stopped by the cafeteria on March 15th had the opportunity to sample six fresh

fruits and vegetables and select their favorites." The post went on to thank the employees who took the time to organize this event that was designed to show employees and patients the importance of incorporating fresh fruit and vegetables into their diet. As *Wow Wall* posts demonstrate the value of commUNITY as defined by the *Values Pledge*, value meaning is seen as congruent between the organization and its employees.

All the posts analyzed for the organizational value of compassion demonstrate congruency between the organization and employees. Posts told stories about employees who make others feel valued and employees who had shown outstanding safety and care for their patients. One post recognized an employee who had been with the organization for many years. The post states that this employee's, "infectious personality spreads to everyone around him," and recognizes the employees, "outstanding support of not only the guest services staff, but everyone that he comes into contact with." This post demonstrates the meaning of compassion as making others feel valued and appreciated. This aligns with the meaning as stated in the *Values Pledge*. A second post shares an experience where an employee demonstrated compassion for her patients, "(employee name) is a true gem and genuinely cares for every patient that comes through her registration desk! I have observed and experienced first-hand her compassion and lover for her patients." In this post, it was stated that the employee left her desk to assist someone who had become lightheaded and pale after a procedure when leaving the hospital. The employee sat with the person and comforted them until nursing staff could arrive and takeover. As seen by these examples, *Wow Wall* posts demonstrating compassion exemplify value meaning for compassion to be congruent between the organization and employees.

Analysis of *Wow Wall* posts demonstrating the organizational values of courage and curiosity suggest meaning for these values are less congruent between the organization and

employees. Five of eight posts demonstrate congruency on the meaning of courage. The

organization's intended interpretation of courage supports speaking up when something is unsafe

and doing what's best with the patient and organization in mind. One post said to demonstrate

courage congratulated a physician who won an award during an employee art show,

"Congratulations again to (employee name) from Carilion Stonewall Jackson Hospital who won

best of show for (art piece title) during Carilion's first system-wide employee art show."

Another thanked two employees who assisted during an incident with a patient, "(employee

name) and (employee name) both came to the rescue of a visitor in our building! 911 had been

called as per policy for the Medical Office Building, but these ladies responded, assessed and

treated the visitor until EMS arrived." A third post told the story of a car accident outside of the

building where two employees helped to free an injured person in the vehicle, "(employee name)

and (employee name) were able to move the vehicle enough to unpin our employee. These two

are truly angels who were placed in the right spot at the right time." According to Carilion's

Values Pledge, courage means supporting teamwork and success by doing what's best with the

patient and organization in mind and speaking up when someone knows something is unsafe or

should be changed. While these examples from *Wow Wall* posts may fit the traditional value of

courage, they do not align with the value of courage as intended by the organization.

Wow Wall posts demonstrating the organizational value of curiosity show a less

congruent meaning of the value by the organization and employees. Curiosity as intended by the

organization means incorporating education into work, asking questions and looking for ways to

improve care. One post said to demonstrate curiosity welcomed a new employee to the

department and recognized the commitment she brings, "Please welcome (employee name) to

CRMH Lobby Pharmacy staff. (employee name) ensures patients have access to the pharmacy

and can receive prescriptions before they leave the hospital." Another post congratulated an employee on their retirement after 39 years with Carilion, "Congratulations! (employee name) is retiring today after 39 years as a partner with (employee name), his long-time friend and next-door neighbor." These examples do not align with the meaning of curiosity as stated in the *Values Pledge*. Posts on the *Wow Wall* demonstrating the organizational value of curiosity suggest that this value is less congruent between the organization and employees.

Consistent congruency of only three of the organizational values between the organization and employees suggests that these values are being partially manifested in Carilion Clinic's internal communications. If all organizational values were being manifested through internal communications, congruency would be seen for each value between the organization and employees throughout *Wow Wall* posts.

RQ3

RQ3 asks if Carilion Clinic public relations efforts contribute to the organization's culture of excellence. Interviews suggest that there are several efforts Carilion Clinic public relations uses to contribute to the organization's culture of excellence. Furthermore, analysis of *Wow Wall* posts show that these efforts are in fact contributing to the organization's culture of excellence by communicating organizational value meaning and supporting a model of symmetrical two-way communication between the organization and employees.

Carilion Clinic public relations employ several tactics to help foster the organization's culture of excellence. These tactics communicate organizational values, allow employees to engage in two-way symmetrical communication with the organization and reward and recognize employees for demonstrating organizational values.

Tactics that communicate organizational values appear from interviews with *MarCom* employees. All interviewees stated that internal and external communications are based around the 5 C values. Channels for internal communications include a website dedicated to employees, a weekly news wrap-up email and social media specifically for employees. "I would say the 5 C's, compassion, community, courage, commitment and curiosity, are always going to be the themes that are carried out in communications," stated management-level interviewee B. Management-level interviewee A echoed by saying, "Very often we will put into an article or other communications, this meets x-value." Congruency of values between the organization and employees as seen in *Wow Wall* posts suggest that internal communications are in fact highlighting the demonstration of organizational values and excellence by employees.

A tactic supporting symmetrical two-way communication between the organization and employees can be seen with *Carilion Ideas Hub*. This tactic, located on the employee website, allows for the submission of ideas and suggestions that employees have for the organization, which can then be voted upon by colleagues. "If an idea gets a certain amount of likes from other employees, the idea is taken to a review team and from that point it is decided whether to act on the idea or suggestion," explained interviewee C. A pilot of the program before the initial launch, "received a lot of great, actionable ideas from employees." It can be seen through this statement that *Carilion Ideas Hub* is a tactic to support two-way symmetrical communication and is being monitored by management. Suggestions have been implemented by the organization which shows that employee voices are being heard and responded to.

The description of the *Carilion Ideas hub* reads, "We value Curiosity and we know that you, our employees, have a lot of great ideas about how we do what we do." In addition to the support for tactics that encourage two-way symmetrical communication, here evidence of the

communication of the 5 C values in the organization's internal communications is seen. A look at the news section of *Insidecarilion.org* also displays that communications demonstrate the 5 C values.

One story illustrates the introduction of a butterfly garden to help enhance palliative care, "We thought creating a butterfly habitat outside of the Compassion Room on the back lawn would have a positive impact on our patients and the hospital campus in general" (Carilion Clinic, News Articles, 2017). In this news story, the organizational value of compassion and its meaning is seen. According to Carilion's *Values Pledge*, compassion means showing care for patients. In this example, the news story is demonstrating Carilion's compassion for patients by creating a butterfly habitat that will positively impact patients.

Another news story introduces a program created by Carilion employees to reduce the amount of medical supplies from Carilion Clinic that end up in landfills. "In the first year of the program at CRMH, thousands of pounds of supplies and equipment were saved from the landfill and instead were distributed. The program redirected 162 pounds to Carilion-sponsored education. Previously, they would have had to pay for the supplies." This news story demonstrates the organizational value of commUNITY. Here, efforts that have been created to improve the health of the communities Carilion serves can be seen. This is not only a demonstration of the value according to the *Values Pledge*, but also Carilion Clinic's organizational mission.

In addition to the *Wow Wall*, tactics that recognize and reward employees for demonstrating organizational values include the Carilion Clinic Shine Awards. Each year, the organization holds an awards gala where one award for each value is given to an employee or team that demonstrates an "exceptional example of our values—commUNITY, courage,

commitment, compassion and curiosity." Nominations for each award are accepted from employees and recipients are announced and congratulated at an annual gala. In addition to the awards gala, *Wow Wall* submissions are selected to be included in the organization's weekly employee news-letter (*e-pulse*) that is distributed via email and posted on social media. "Entries from the *Wow Wall* are also sent out in *e-pulse*, to all employees, one feature a week, and they are also featured on social media," stated interviewee C.

From these examples, it can be suggested that Carilion Clinic public relations tactics make an effort to contribute to the organization's culture of excellence by communicating organizational values, supporting two-way symmetrical communication and providing opportunities for employees to receive recognition for the demonstration of organizational values. These efforts encourage employees to demonstrate organizational values and represent the push for the adoption of the values by employees. Employees may be more likely to adopt, demonstrate and live by these 5 C values when they know that doing so allows them the opportunity to receive recognition from the organization. Combined with the evidence of partial congruency of organizational values between the organization and employees as seen in *Wow Wall* posts, it can be stated that Carilion Clinic public relations efforts are contributing to the organization's culture of excellence.

Chapter 6 Discussion

Excellence Principles

This study found that five of the seven excellence principles as established by Grunig, Grunig and Dozier (2006) are present in Carilion Clinic public relations internal practices. Through analysis of internal communications, specifically Carilion Clinic's *Wow Wall*, it was found that three of the five organizational values were congruent between the organization and its employees. Together, these findings suggest that Carilion Clinic public relations efforts are contributing to the organization's culture of excellence.

Interviews with the *MarCom* (marketing and communications) team revealed the presence of five of the seven principle of excellence in Carilion Clinic public relations. It was found that the department is viewed as a managerial function that works closely with top management to provide feedback and insight during organizational decision making. Public relations practitioners at Carilion Clinic were found to have experience in both technical and managerial functions as the public relations manager was involved in managerial decision making and technical functions such as writing and researching. Public relations was found to be an integrated department at Carilion Clinic and is not used just as a communication tool for another department. The use of two-way symmetrical communication is present in Carilion Clinic public relations through the use of feedback channels that are provided to employees. Finally, interviews revealed that Carilion Clinic holds a participative culture based on symmetrical two-way communication that fosters teamwork and togetherness.

Measures for communication programs and campaigns (excellence principle five) were not revealed during interviews. One interview question inquired about the goals of communication programs and plans used by public relations. It was expected that responses

would include how these goals were measured by public relations. It is possible that this is an area that that needs to be strengthened by the Carilion Clinic public relations team. A clear set of program and plan measurements that are used frequently would be useful in determining the success of these items. This may be a latent principle in Carilion Clinic public relations that did not appear from interviews. Interview questions attempted to probe for the presence of communication plan and program measurements by asking interviewees to talk about these types of programs. However, these were not successful at generating conversation about measures. Nonetheless, explicit, constant measures of communication programs and plans are beneficial to any organization's success.

Direct evidence supporting the presence of the remaining two excellence principles was not found in the study. However, this may be due to the questions that were asked during interviews. It is possible that these questions failed to probe interviewees for the presence of the principles of activism and constant measurements that evaluate communication programs. More explicit questions to identify principles may have facilitated a response that generated additional support for these principles.

Despite this, study results generate support for the excellence principles designated by Grunig, Grunig and Dozier (2006). The presence of excellence principles in Carilion Clinic public relations internal practices adds to the support for these principles as the organization itself is successful. Carilion Clinic is one of Virginia's largest employers west of Richmond and brought in a revenue of 1.5 billion in 2015 (Carilion Clinic, "About Us"). Two of Carilion's hospitals were named as winners of the 2016/17 most preferred hospitals in the state of Virginia by the National Research Corporation (NRC Health, "2016/2017 Consumer Choice Award Winners). This award is given to top hospitals that have the highest quality and image in their

markets in each state, as voted by consumers. Carilion Roanoke Memorial Hospital was named

the number five best hospital in Virginia by U.S. News and World Report (U.S. News & World

Report, "Best Hospitals in Virginia").

Carilion Clinic can be labeled a successful organization as seen through their consumer

ratings, awards and revenue generated. As excellence principles are seen to be at play in the

organization, these findings generate support for the use of excellence principles as a guide by

public relations practitioners to help contribute to the overall excellence of an organization.

Identifying a successful health organization that incorporates these principles into their public

relations illustrates the benefit the principles may have on contributing to organizational success.

Using these principles as a guide can be beneficial to an organization's public relations to help

contribute to overall organizational success.

Study results challenge the criticisms of the excellence theory. Most criticism focuses on

the use of two-way symmetrical communication and argues that this style of communication is

generally not used in public relations and may even be impossible at times. Murphy (1991)

argues that few public relations departments utilize two-way symmetrical communication and

instead use a combination of asymmetrical and symmetrical communication. This is found not to

be the case with Carilion Clinic. The organization's public relations aim for two-way

symmetrical communication, especially when dealing with internal publics. Programs that have

been put into place by the *MarCom* department encourage employees to provide feedback and be

heard. This feedback is also communicated to top management as the organization's public

relations are in constant, direct contact with the organization's top senior executives.

Dover (1995) argues that two-way symmetrical communication does not work well in the

real world of public relations. However, Carilion utilizes this type of communication to help

foster their culture of excellence. Carilion provides several channels that allow employees to provide feedback and be heard, such as their *Carilion Ideas Hub* and anonymous telephone lines that allow employees to report quality issues. For Carilion Clinic, two-way symmetrical communication works in the real world of public relations.

Macnamara (2009) found that one-way communication seems to dominate public relations practice. However, in the internal context, the study found that Carilion Clinic public relations is dominated by two-way symmetrical communication through efforts and tactics such as employee-specific social media and anonymous feedback telephone lines.

Results from this study suggest that the excellence principles can be beneficial to public relations contributions to overall organizational success and excellence. It can be suggested that two-way symmetrical communication with internal publics is indeed possible and can work well in the real world of public relations when practiced correctly. Efforts that Carilion Clinic has implemented to facilitate two-way symmetrical communication help to achieve excellence principles and can be looked to by other organizations when implementing and evaluating public relations practices.

Value Congruency

From the analysis of Carilion Clinic's *Wow Wall* posts, it can be seen that the organizational values of commUNITY, commitment and compassion, and their meanings, are congruent between the organization and employees. Congruent values between an organization and its employees can lead to enhanced organizational performance, employee productivity and happiness (Kotter & Heskett, 1992; Fitzgerald & Desjardins, 2004).

Carilion Clinic public relations efforts and tactics have helped to achieve congruency of value meaning, which in turn enhances organizational performance and employee happiness.

This is also evident from the interviews conducted with *MarCom* employees and posts by

employees on the *Wow Wall*. Interviewee B stated, "I think that if you wander the halls, you will

find nine out of ten employees are thrilled to work here on any given day of the week." This

statement is supported by posts seen on the *Wow Wall*. Posts come from Carilion employees that

witness co-workers demonstrating organizational values. These posts show appreciation for co-

workers and honor those that demonstrate commitment, willingness to help and compassion for

others. Demonstration of commitment to values suggests that employees are happy and thrilled

to work for Carilion Clinic.

  Additionally, management will occasionally comment on *Wow Wall* posts thanking

employees for demonstrating values and recognizing these employees as excellent members of

the Carilion family. For example, on a post where one employee exhibited the value of

commitment, a top-level manager commented, "(employee's name)'s in-person smile is as good

as the one you imagine! Way to go, (employee name)." Another post filed under the value of

CommUNITY congratulated a department that recently began taking up a collection for a new

charity every quarter. Under the post is a comment from a Carilion vice president stating, "What

a great looking team." Comments on these posts from management help to encourage employees

to demonstrate organizational values as they further recognition and let employees know that

management appreciates their work.

  An organization's public relations can be used to promote value commitment and provide

mutual understanding between the organization and its employees. When one thinks of public

relations, it is easy to overlook employees as a public. This public may be one of the most

important publics to an organization as employees can be considered the face of the organization.

Internal publics allow an outsider to gain an insider's view of the organization. If this view is

unfavorable by employees and there is lack of mutual understanding, it can alter an outsider's

evaluation of an organization.

The communications team strives to highlight value demonstration when developing

communications that are then distributed across internal communication channels. "The 5 C's,

compassion, community, courage, commitment and curiosity are always going to be the themes

that are carried out in communications," stated management-level interviewee B, "These play out

in the messaging that is on our Intranet, *Inside Carilion*. We honor those values and we try to

highlight when employees exhibit them so that we are developing a sense of pride." By

communicating value meaning through demonstration, the communications developed by public

relations seek to re-inforce organizational value meaning and promote mutual understanding.

The organizational values of courage and curiosity appear to be less congruent between

the organization and its employees. Analysis of *Wow Wall* posts show that some employees hold

different meanings for these values other than those intended by the organization. It is possible

that these organizational values are too vague and stray from the original meaning of the words.

For example, when looking to Carilion Clinic's *Value Pledge*, the value of courage is

demonstrated by employees who embrace change, speak up to ensure safety, are welcoming and

engaged and support teamwork and recognize success. Traditionally, courage means to step out

of one's comfort zone, or take risks, or stand up for what's right. *Wow Wall* posts by employees

seem to demonstrate the traditional value of courage rather than the meaning stated by the

organization in the *Values Pledge*. This value is less congruent between the organization and

employees.

It is also possible that different aspects of Carilion Clinic's culture (i.e. values) are being

interpreted differently by internal audiences. Values may be ambiguous and have different

meaning for both the sender and the receiver. This is an interesting finding as employees were

asked to contribute to the development of organizational value meaning and manifestation.

Carilion Clinic's C-team and *MarCom* developed the new organizational values, however,

employees were invited to help develop value meaning and manifestation. These findings

highlight the importance of continued research in the aspects of differentiation, integration and

fragmentation in understanding organizational culture. These aspects help to explain the

differences in the interpretation of values, symbols and stories that help to create organizational

culture (Martin, 1992).

Carilion Clinic public relations efforts seek to promote value commitment and provide

mutual understanding between the organization and employees. Efforts have been successful at

communicating value meaning as three of the five organizational values were seen to be

congruent between the organization and employees. These organizational values are being

correctly manifested by employees as demonstrated through the posts on the *Wow Wall*.

Tactics to Achieve Value Congruency

Some posts from the *Wow Wall* exhibit the demonstration of more than one value by

employees. For example, one post was thanking an employee who came in on New Year's Day

to help cover lunch breaks for a department that was short staffed. This post demonstrated the

value of commUNITY as the employee showed support for her co-workers by coming in on her

day off, as well as the value of commitment by doing something that was beyond the employee's

responsibilities. The post was filed under the demonstration of commUNITY but when read,

demonstrates the value of commitment as well. It may be beneficial for Carilion to allow

employees to select multiple values that have been demonstrated by an employee when posting

to the *Wow Wall*. It is possible that employees would indicate multiple organizational values that

were demonstrated during the incident that was witnessed. This can help with the congruency of value meaning between the organization and its employees. The employees who read these posts can then see how the value was demonstrated and can better interpret value meaning for the values rather than confusing them with other organizational values.

Management will occasionally comment on *Wow Wall* posts thanking or recognizing employees for demonstrating organizational values. To improve value congruency and help foster culture, management should comment as often as possible to help encourage employees to demonstrate organizational values. Recognizing the excellence these employees demonstrate can help to encourage employees to live by the values and demonstrate them regularly. Research shows that employees are more committed when their values are congruent with the values held and modeled by management (Giberson et al., 2009). When management comment on *Wow Wall* posts, they are showing support for and encouraging the demonstration of organization values. These actions also allow management to model the organization's values of commUNITY, commitment and compassion.

To further achieve congruency of value meaning between the organization and employees, Carilion Clinic public relations can incorporate the less congruent values of courage and curiosity into their communication more often. As found in the interviews, organizational communications are developed around the 5 C values and work to highlight demonstration of these values. It would be beneficial for Carilion to produce more communications that demonstrate the values of courage and curiosity, as defined by the organization and the *Values Pledge*, as these are the values that lack a congruent meaning. This can help to shape value meaning for employees as co-workers who are demonstrating the correct manifestation of values are appearing frequently throughout internal communications.

Other tactics such as spotlighting each value for a designated period may be beneficial for the organization as well. Carilion Clinic public relations team could create a five-month campaign where each month focused on one of the organizational values. During this time, communications can be centered around a specific value while highlighting and honoring employee demonstration of that value. This would help to reinforce value interpretation as employees will distinguish the ways in which their peers demonstrate each of the organizational values. This approach could be similar to the campaign that was used to introduce the new values. The original campaign introduced each new organizational value, one at a time, every two months. During this time, values were highlighted and activities, tasks and games were provided to departments to conduct with employees. As the new organizational values were launched in 2012, regular campaigns that remind employees of the values and what it means to live by those values can also help improve value congruency between the organization and its employees.

Carilion's Tactics to Foster Organizational Culture

As organizational culture emerges from members' collective symbol using practices (Eisenberg, Goodall & Trethwey, 2010), it is important for Carilion Clinic public relations to communicate a shared meaning of organizational values. When there is incongruence of value meaning between the organization and its employees, public relations can be beneficial in helping to communicate the meaning of these values to employees in order to help foster organizational culture and promote value commitment.

Communications that are developed around the mission, vision and values of an organization can help to foster organizational culture. Carilion Clinic public relations seeks to foster culture by incorporating their organizational mission, vision and values, and value

demonstration by employees into their communications. Other efforts include rewarding employees who exhibit excellence and demonstrate organizational values.

Programs to reward those employees living by the organization's values work to foster Carilion's culture of excellence and give employees a reason to buy into values and demonstrate them. Maslow's hierarchy of needs (1943) establishes a pyramid of basic needs that humans seek to drive their motivation. The third level on this hierarchy of needs is love and belonging. Humans seek a sense of belonging, they want to be part of a group and feel loved (Maslow, 1943). The *Wow Wall* and annual awards gala both seek to reward employees by highlighting those who demonstrate organizational values in the work that they do. These programs give Carilion Clinic employees a way to meet this basic human need of belonging. As a part of the Carilion group, you live by the values of the organization and when you are caught doing so, you will be recognized and rewarded as an excellent member of the group. Programs such as these give employees motivation to live by and demonstrate organizational values.

Two-way symmetrical communication is beneficial in fostering organizational culture that is participative (Grunig, 1992). Carilion Clinic public relations provides programs that facilitate this type of communication between the organization and its employees.

Tactics are in place to support and encourage two-way symmetrical communication between the organization and internal publics. *Carilion Ideas Hub* allows employees to bring ideas and suggestions to the organization. In addition, public relations is directly involved with top-level management and works to advise decision-making and communicate changes. As public relations are in direct contact with publics, they can bring the voices of employees to top-level management during decision making. These efforts allow the employees to be heard and

help contribute to the participatory culture at Carilion Clinic by engaging in two-way symmetrical communication.

To further help employees live by organizational values, Carilion has allowed its employees to help establish value meaning. Not only does this help organizational values better fit employee's personal values, but it allows the employees to feel a sense of participation. Previous literature notes the importance of a participative organizational culture (Peters and Waterman, 1982; Grunig, 1992). Peters and Waterman (1982) stress that organizational values should come from organizational culture. Carilion has allowed their organizational values' meanings to come from within the culture. "The C-suite and I played a part in determining what the five values were," stated a management-level interviewee A, "We wanted something that evokes emotion, and healthcare workers are very dedicated to taking care of patients and they are very empathetic, so we wanted them (values) to speak to those feelings." From this statement, it can be noted that Carilion developed their values from the organizational culture that existed. The organizational values that were developed were those that are commonly held by healthcare workers. Carilion then allowed their employees to define those values and give them meaning based on the organizational culture that existed. By allowing employees to participate in organizational decisions and have their voices heard, Carilion Clinic is fostering its organizational culture to support two-way symmetrical communication as well as a sense of teamwork and belonging.

Contributions to Organizational Culture Research

Support for the assertion that excellence in public relations generates a direct positive influence on organizational culture (Meng, 2014) is generated through the study's results. In addition, results suggest a new perspective for viewing organizational culture. The practical view

of organizational culture says that culture can be managed and shaped to create a more effective

organization (Eisenberg, Goodall & Trethwey, 2010). This view of organizational culture,

combined with the interpretive view, make up the perspective that is presented from study

results. Carilion Clinic can be seen to foster their organizational culture rather than manage it

while allowing the culture to emerge from within the organization.

Excellence in public relations can be seen to generate a direct positive influence on

organizational culture (Meng, 2014). Support for this assertion can be seen from study results as

excellence principles are present in Carilion Clinic public relations and help to influence

organizational culture. Interviews revealed that excellence principles were present in Carilion

Clinic public relations and identified programs that support two-way symmetrical

communication between the organization and employees. These programs help to foster a

participatory culture where employee voices are heard and responded to. Furthermore, analysis

of *Wow Wall* posts reveal that majority of organizational values are congruent between the

organization and its employees, which shows that excellence principles are helping to foster

Carilion's culture of excellence. This demonstrates that excellence in public relations has

positively influenced organizational culture at Carilion Clinic.

The practical view of organizational culture says that culture can be managed (Eisenberg,

Goodall & Trethwey, 2010). The word "manage" gives the notion that organizations have

complete control over their culture and can modify culture to fit the organization's needs. Instead

of stating that culture can be managed, it may be wiser to state that organizational culture can be

fostered. Combining the practical view with the interpretive view of organizational culture,

which says culture emerges from within the organization and cannot be manage, creates a new

perspective for viewing organizational culture.

Organizations can support culture and help to influence or shape culture using public relations. Carilion Clinic can be seen to foster organizational culture by highlighting organizational values throughout their internal communications. This allows the organization and employees to share a congruent meaning of values as meaning is being demonstrated through communications. Fostering the culture allows employees to share in culture manifestation and development, rather than being told what their culture is.

Carilion has allowed employees to take part in creating their culture of excellence. When the new organizational values were created, Carilion looked to employees to help develop value meaning. While the *MarCom* team and organizational executives came up with the values, employees were invited to help develop what those values meant. "We had a cross-functional team," stated management-level interviewee A, "Representatives from all over the system met at a conference to decide what the actions were that supported each value." Through this method, Carilion has allowed their employees to define organizational values in the ways that the employees themselves interpret these values. This allows organizational values to become real for employees. Actions that portray these values are ones that employees are showing as healthcare workers; actions align closely with their personal values. Organizational values were created by management, but value meaning and manifestation of these values were developed by the employees themselves. These were then established in Carilion Clinic's *Values Pledge* that employees receive and are required to sign.

In this view, Carilion is fostering organizational culture rather than managing it. The practical view of organizational culture says that culture can be managed, which many scholars disagree with. A new perspective for viewing organizational culture as something that can be shaped or fostered allows for a different look into how organizational culture operates. As seen

in this study, organizational culture may not be able to be managed, but organizational culture can be fostered.

Limitations and Future Research

Although the presence of only five of the seven excellence principles appeared through employee interviews, small support for the remaining principles was determined. It is possible that interview questions that were developed to probe for the presence of excellence principles were misunderstood by participants or failed to facilitate responses that explicitly support the presence of the remaining excellence principles. Interviews were limited to around 30 minutes with each participant. This may not have been enough time to generate in-depth answers from *MarCom* employees. Had time allowed, asking for specific examples and stories may have provided greater detail and a deeper understanding of public relations. Future research studies should develop questions that are better able to probe for the presence of all excellence principles. Interviews in these studies should attempt to speak with a greater number of employees across a greater range of titles to solidify excellence principle presence. In addition, the study found presence of excellence principles by public relations while communicating with internal publics. Future research would benefit by analyzing external public relations communication to identify presence of excellence principles.

During the analysis, the constant comparative method was used to determine the number of *Wow Wall* posts to be examined for value congruency between the organization and its employees. It is possible that if a greater number of posts were analyzed, greater congruency for each organizational value may have resulted. Value congruency was also limited to analysis of *Wow Wall* posts; a deeper analysis of other employee communications would help to further solidify analysis findings. Future studies would benefit from a greater sample size to ensure that

value meaning is congruent between the organization and its employees. In addition, the analysis could be expanded by interviewing employees and asking what each value means to them. Using this method would allow the researcher to analyze congruency first-hand rather than by analyzing secondary artifacts.

Analysis of internal communications and how they explicitly demonstrate organizational values would be beneficial to future research. Through a more in-depth analysis, researchers can uncover specific tactics that prove to be beneficial when developing communications that demonstrate organizational values. Interviews with employees that focus on identifying efforts and tactics that public relations uses could be conducted to identify which have been successful and which have not.

It should be noted that because of the researcher's prior association with the Carilion Clinic public relations team, the researcher was better able to access an insider view of the organization and the culture at play. It would be beneficial for organizations to allow outsider access to internal communications to evaluate and study tactics, efforts, and procedures that are used to help foster organizational culture and communicate with internal publics. Traditionally, this is known as a communication audit, which can be beneficial to an organization.

This study focused on value congruency between the organization and its internal public of employees. Evaluating value congruency between the organization and its external publics would allow for an analysis and evaluation of external efforts and tactics used to help foster culture outside on the organization.

Chapter 7 Conclusion

Identifying the excellence principles that are present in Carilion Clinic public relations has allowed for a deeper understanding of how the organization's public relations contributes to its culture of excellence and how the presence of these principles plays a role in fostering organizational culture. The study used the excellence theory as lens to explore how public relations contribute to the culture and overall success of a large health organization. Interviews with Carilion Clinic *MarCom* employees were conducted to reveal the presence of excellence principles in the organization's public relations and an analysis of *Wow Wall* posts was conducted to identify the manifestation of organizational values in Carilion's internal communications. Interviews and analysis of *Wow Wall* posts allowed for both an employee-perspective and management-perspective view. The combination of these methods allowed for an insider view as to how Carilion Clinic public relations contributes to organizational culture through the use of excellence principles.

The study found that five of the seven excellence principles are present in Carilion Clinic public relations. Although all the principles were not present, this does not mean that Carilion Clinic public relations cannot be considered excellent. All excellence principles do not need to be present; rather the organization should be following majority of the principles, especially those which best fit the organization's use of public relations and strategic goals. Study results suggest that Carilion Clinic public relations internal communication practices can be categorized as excellent.

Analysis of Wow Wall posts revealed that three of Carilion's five organizational values are congruent between the organization and its employees, suggesting that these values are partially manifested in internal communications. Although the analysis revealed that not all

organizational values were congruent, this does not mean that Carilion Clinic is failing in its communication of values or that the culture is suffering. It is possible that employees are interpreting values differently, which may be beneficial. This leaves some interpretive space for employees to develop value meaning. Public relations may be able to benefit from this by using the *Wow Wall* as a feedback channel to determine employee interpretation of values. Public relations can then decide if value meaning needs to be altered to help better foster organizational culture.

Together, these findings suggest through the use of excellence principles, Carilion Clinic public relations efforts are working to help foster organizational culture.

Public relations has played a role in fostering Carilion's organizational culture by allowing employees to participate in developing organizational value meaning and manifestation, and by communicating value meaning by making the organization's vision, mission and values a central component to all communications. Public relations can play a crucial role in fostering organizational culture and how the presence of excellence principles in public relations has allowed for this.

This study's results challenge criticisms of the excellence theory. From looking at Carilion Clinic and its public relations, it is possible to foster organizational culture and that two-way symmetrical communication is possible and beneficial with publics, especially internally, when fostering organizational culture. The importance of public relations in organizations is also noted. Not only can public relations help to communicate organizational decisions, milestones and achievements to allow a more favorable image to the public, but it can also help foster organizational culture.

This study's results also suggest a new way to view organizational culture that combines the practical and interpretive views. In this new view, organizational culture can be fostered by management, rather than managed, while still allowing culture to emerge from within the organization itself. This view of organization culture can be seen at Carilion Clinic where employees have contributed to developing organizational value meaning which is then supported and re-enforced by public relations tactics and efforts.

The current research suggests that the excellence theory and its principles are still operating in public relations. These principles can be useful as a guide for public relations seeking to foster organizational culture. Communicating organizational values and supporting two-way symmetrical communication help to foster a participative organizational culture. The importance of public relations teams that work closely with top-management and practice two-way symmetrical communication is seen in the study's results. This has allowed Carilion Clinic to foster its organizational culture and allows for value congruency between the organization and its publics.

The congruency of three of the five organizational values between the organization and its employees can be seen through the posts on the *Wow Wall*. These stories generate value demonstration that fits with Carilion Clinic's *Values Pledge*. To help bridge the value interpretation gap between the organization and its employees for the remaining values, Carilion Clinic can apply tactics such as implementing a greater number of communication materials that demonstrate value meaning. Anniversary campaigns that remind employees of values and why the work they do is excellent can be beneficial to the organization to help further foster the culture of excellence that has been established.

Although public relations is integrated into a communication function, study results suggest an opportunity for Carilion Clinic to improve public relations by considering a more appropriate structure for a non-profit organization that serves the public. At Carilion, public relations is situated in the MarCom, or marketing communications, department. This puts an emphasis on marketing and communications as the title suggest, while public relations can be seen as only a facet of the communications element. Organizational image and reputation are key for a non-profit organization, focus should not be on the bottom-line. Public relations works to manage relationships with various publics and help to shape organizational image and reputation while marketing focuses on selling a product or retaining and gaining customers; the bottom line. Considering public relations as a stand-alone department, or re-structuring to give public relations greater emphasis in the organization, would help to better manage relationships with organizational publics. Especially in a non-profit organization, there is a need for an ethical conscience for the organization, which can be hard to achieve if the focus of communications is on sales and profit through marketing. Public relations can be that ethical conscience, and to better play this role in a non-profit organization, public relations should not be overshadowed by other communication functions such as marketing.

Other organizations may benefit from this study by following Carilion Clinic's roadmap for success during an organizational change. Carilion Clinic has allowed employees to participate in organizational decision making and value development which has allowed public relations to foster organizational culture. This can be seen through the empirical findings from the study. Employees share congruency on value meaning with the organization as show by *Wow Wall* posts. Carilion Clinic has demonstrated a strong organizational culture that it successfully maintains through its public relations efforts and tactics. By following in Carillion Clinic's

footsteps, other organizations can work to foster a participatory culture where values are

congruent and employees enjoy the work they do while being happier and more satisfied.

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Appendix

Interview Questions

1. How closely do you work with the C-Team and how is public relations input received and the team involved when it comes to organizational decision-making? For example, when the new values were developed?
2. Describe the type of communication used with employees. What are some keywords you would use to explain the communication *MarCom* uses with employees?
3. Tell me about your employee communication program/plan and how it was developed. What are the goal of the program/plan?
4. What types of employee feedback programs are available? How is that feedback heard and then communicated back to employees?
5. What types of employee programs are there to reward and recognize excellent Carilion employees?
6. Tell me a little more about the culture of excellence here at Carilion.
7. Talk about the structure of organizational culture and how communication plays a role in shaping/influencing that culture.
8. If you could describe the culture here at Carilion in one sentence, what would you say?
9. What role did you, physicians, or other groups play in the development of the 5 Cs?
10. How were the new 5 C values disseminated to internal publics?
11. Describe a physician who you think really fits the Carilion spirit well?

Values Pledge

Carilion Clinic Values Pledge

OUR MISSION
Improve the health of the communities we serve.

OUR VISION
We are committed to a common purpose of excellent patient care, exceptional community health and lower cost.

COMMUNITY
I pledge to…
- Be actively involved in supporting the health of those we serve.
- Take pride in all our facilities.
- Be a champion for Carilion Clinic.
- Support the unity of our Carilion team.
- Collaborate with coworkers to find solutions.

COURAGE
I pledge to...
- Support teamwork and recognize success.
- Be welcoming and engaged.
- Embrace change.
- Speak up to ensure safety.
- Work with integrity by always doing the right thing for our patients, our employees, our community and for Carilion.

COMMITMENT
I pledge to...
- Respond to requests, take ownership and be accountable for my work.
- Give more than expected.
- Put the patient and customer first.
- Provide an excellent experience with a positive attitude.
- Communicate respectfully and ensure privacy.
- Understand and follow the laws and regulations that govern our work.

COMPASSION
I pledge to...
- Care for others as they would like to be treated.
- Listen actively and keep an open mind.
- Make everyone feel valued and appreciated.
- Embrace and respect diversity.

CURIOSITY
I pledge to...
- Look for ways to improve.
- Embrace learning and share knowledge.
- Ask questions and seek answers.
- Embrace the education I am provided and apply it to my work.

I am an essential member of the Carilion Clinic team. I am proud of my job, my team members, my facility and most of all—myself When you meet me, you can tell that I am Carilion by the way I conduct myself. I pledge to be accountable for living the Carilion Clinic Values.

CARILIONCLINIC

Consent Form

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
Informed Consent for Participants
in Research Projects Involving Human Subjects

Title of Project: Carilion Clinic: Corporate culture and excellence

Investigator(s):	**Dr. John C. Tedesco**	**Tedesco@vt.edu**
	Name	E-mail / Phone number
	Dylan Scheible	**Dylans7@vt.edu/434-996-3755**
	Name	E-mail / Phone number

I. Purpose of this Research Project

This research study is to investigate organizational culture and excellence at Carilion Clinic. Results from the study will be used to complete a Master's thesis and may be used for potential conference presentation and/or publication in a scholarly journal, as well as in a summary report to be shared with Carilion Clinic. You are among about 20 Carilion Clinic employees who are participating in the study.

II. Procedures

You will participate in a face-to-face interview that will be audio recorded and transcribed by the researcher. During this interview, you will be asked questions that are meant to probe organizational culture and excellence at Carilion Clinic. The interview will take approximately 15 to 30 minutes but no more.

III. Risks

The questions you will be asked are similar to the types of questions you may be asked in everyday life. Discomfort or risk from viewing these messages, if any, will be minimal and no greater than what can be expected in everyday life. Quotes from interviews may be used in reports given to Carilion Clinic and/or academic publications. Risk of loss of confidentiality is possible due to the small number of participants and the use of quotes from interviews. To minimize risk of being identified, pseudonyms will be given if/when quotes are used and small details may be changed to help enhance confidentiality. In addition, you may choose to consent to the use of quotations from the interview at the bottom of this consent form. The decision to participate will not affect your employment with Carilion Clinic or Virginia Tech.

IV. Benefits

Results from the study may be used to make suggestions for improvements in communication between Carilion Clinic and its employees. No promise or guarantee of benefits has been made to encourage you to participate.

V. Extent of Anonymity and Confidentiality

Your privacy will be protected throughout the process and all the information you submit will be kept confidential. Data that will be collected during the interview will be identified only by participant code. Identifiable participant codes will be stored separately, and securely from

Consent Form Continued

coded data. Only study investigators will have access to data and participant codes. Quotes from interviews may be used in reports given to Carilion Clinic and/or academic publications. Pseudonyms will be given if/when quotations are used to help minimize identification. Small details of quotations may also be changed to help enhance confidentiality. At no time will the researchers release identifiable results of the study to anyone other than individuals working on the project without your written consent. The Virginia Tech (VT) Institutional Review Board (IRB) may view the study's data for auditing purposes. The IRB is responsible for the oversight of the protection of human subjects involved in research.

VI. Compensation

There will be no compensation for participating in this study.

VII. Freedom to Withdraw

It is important for you to know that you are free to withdraw from this study at any time without penalty. You are free not to answer any questions that you choose or respond to what is being asked of you without penalty.

Please note that there may be circumstances under which the investigator may determine that a subject should not continue as a subject.

Should you withdraw or otherwise discontinue participation, you will be compensated for the portion of the project completed in accordance with the Compensation section of this document.

VIII. Questions or Concerns

Should you have any questions about this study, you may contact one of the research investigators whose contact information is included at the beginning of this document.

Should you have any questions or concerns about the study's conduct or your rights as a research subject, or need to report a research-related injury or event, you may contact the VT IRB Chair, Dr. David M. Moore at moored@vt.edu or (540) 231-4991.

IX. Subject's Consent

I have read the Consent Form and conditions of this project. I have had all my questions answered. I hereby acknowledge the above and give my voluntary consent:

   I consent to the use of quotations from this interview in any report given to Carilion Clinic and/or academic publications.

_____ Date_____
Subject signature

_____
Subject printed name

IRB Approval

Virginia Tech

Office of Research Compliance
Institutional Review Board
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Blacksburg, Virginia 24061
540/231-4606 Fax 540/231-0959
email irb@vt.edu
website http://www.irb.vt.edu

MEMORANDUM

DATE: February 6, 2017

TO: John C Tedesco, Dylan Scheible

FROM: Virginia Tech Institutional Review Board (FWA00000572, expires January 29, 2021)

PROTOCOL TITLE: Carilion Clinic: Corporate Culture & Excellence

IRB NUMBER: 17-024

Effective February 6, 2017, the Virginia Tech Institution Review Board (IRB) Chair, David M Moore, approved the New Application request for the above-mentioned research protocol.

This approval provides permission to begin the human subject activities outlined in the IRB-approved protocol and supporting documents.

Plans to deviate from the approved protocol and/or supporting documents must be submitted to the IRB as an amendment request and approved by the IRB prior to the implementation of any changes, regardless of how minor, except where necessary to eliminate apparent immediate hazards to the subjects. Report within 5 business days to the IRB any injuries or other unanticipated or adverse events involving risks or harms to human research subjects or others.

All investigators (listed above) are required to comply with the researcher requirements outlined at:

http://www.irb.vt.edu/pages/responsibilities.htm

(Please review responsibilities before the commencement of your research.)

PROTOCOL INFORMATION:

Approved As: **Expedited, under 45 CFR 46.110 category(ies) 6,7**
Protocol Approval Date: **February 6, 2017**
Protocol Expiration Date: **February 5, 2018**
Continuing Review Due Date*: **January 22, 2018**

*Date a Continuing Review application is due to the IRB office if human subject activities covered under this protocol, including data analysis, are to continue beyond the Protocol Expiration Date.

FEDERALLY FUNDED RESEARCH REQUIREMENTS:

Per federal regulations, 45 CFR 46.103(f), the IRB is required to compare all federally funded grant proposals/work statements to the IRB protocol(s) which cover the human research activities included in the proposal / work statement before funds are released. Note that this requirement does not apply to Exempt and Interim IRB protocols, or grants for which VT is not the primary awardee.

The table on the following page indicates whether grant proposals are related to this IRB protocol, and which of the listed proposals, if any, have been compared to this IRB protocol, if required.

— *Invent the Future* —

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
An equal opportunity, affirmative action institution