



## Succession Planning



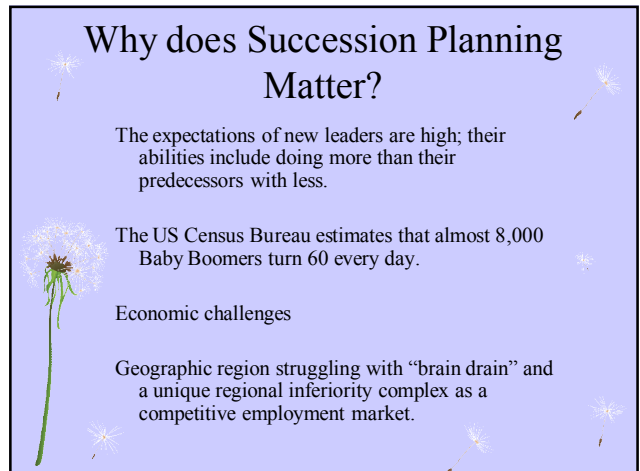
## Ladder to Leadership

- ★ Funded by RWJF, CCL, & Community Health Foundation of Western & Central NY  
\*not endorsed
- ★ Purpose – enhance the leadership capacity of community-based nonprofit health-related organizations serving vulnerable populations
- ★ 16-month leadership development curriculum



## Succession Planning Team

- Collene Dare Alexander – New York State Association for Rural Health
- Diane Blasczienski – Oswego County Opportunities
- Zachary Chapman – Carthage Area Hospital
- Julie Corsoniti – Crouse Hospital
- Maureen Kelly – Planned Parenthood of the Southern Finger Lakes
- Cassandra Sheets – Mohawk Valley Council on Alcoholism/Addictions



## Why does Succession Planning Matter?

The expectations of new leaders are high; their abilities include doing more than their predecessors with less.

The US Census Bureau estimates that almost 8,000 Baby Boomers turn 60 every day.

Economic challenges

Geographic region struggling with “brain drain” and a unique regional inferiority complex as a competitive employment market.

## Regulating Agencies

Regulatory agencies have not yet mandated succession planning, however, the time may come:

- Joint Commission
- Office of Professional Management, OPM
- NYS DOH Commissioner
- Department of Labor Commissioner
- NYS OASAS Commissioner

- “Increase the number of staff at all levels in the field to represent the diversity of the populations that you serve.
- Increase the number of credentialed staff and other Qualified Health Professionals working in the field.
- Increase full knowledge, expertise and retention of high – performing staff throughout the field.
- Clearly, the concept of succession planning must be closely aligned with the talent management.”

Karen M. Carpenter-Palumbo, OASAS Commissioner

## What do other’s think?

Internet Survey distributed to our peers 12/08

- 88 responses, majority from not-for-profit human service organizations
- 18% stated they always use succession planning
- 30% never used succession planning
- Many did not fully understand what exactly succession planning was.

*“Succession Planning is a process of developing talent to meet the current and future human resource needs of the organization. A succession program is a deliberate and systematic effort by an organization to ensure leadership continuity in key positions, retain and develop intellectual knowledge capital for the future, and encourage individual advancement.”*

- Alex Grimshaw, CEO, PPS International Limited

## Succession Planning vs. Replacement Planning

### *Proactive vs. Reactive Approach*

Dale Carnegie Training Institute defines the two in this way:

#### **Replacement Planning**

**Short-term:** covers sick or vacation time.

**Long-term:** Addresses death, retirement, unexpected resignation, or long-term disability.

**Succession Planning** starts at the levels of project manager & supervisor and extends up to the highest position in the organization.

## One Approach to Succession Planning:

*6 steps for success*

## Step One

Recognize the Need & Understand the Value

Leadership Development and Succession Management have the potential to have a four-prong effect.

*“Using Leadership Development Programs to Improve Quality and Efficiency in Healthcare”*

Journal of Healthcare Management Sept/Oct 2008

Improve the caliber and quality of the workforce

Reduce employee turnover and related expenses

Leadership & Succession Management

Improve the efficiency in organizational education and development

Focus organizational attention on strategic priorities

## Step Two

### Make a Commitment

Succession Planning and Leadership Development works best with commitment from top management / board of directors (and can happen in big and small ways!)

## Step Three

### Organizational Assessment

- What are your organization's long-term strategic goals
- Where do current gaps in leadership positions exist now and where will they be as you progress in your organization's development
- If you have identified current employees to fill those "gaps", what skills do they need to perform the key roles proficiently and what plan do you have in place to build those skills.
- Develop job competency models

## Step Four

### Talent Management

Provide opportunities for employees to develop those "gap skills" by offering training programs at your own facility or through outside sources to address those needs.

- Crucial Conversations Course @ Crouse Hospital
- Leadership reading group at Planned Parenthood
- Off site training – bring lessons back
- Other examples?

## Step Five

### Evaluate Performance

- Communicate with your staff your thoughts
- Annual Individual learning plans
- Examples of evaluation tools

## Step Six

Listen, listen, listen.

## Summary

- Succession planning can be modified to fit all organizations
- This is a fluid process
- Succession planning can happen formally and informally

# Questions?

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