

PROJECT LEGACY: SUCCESSION PLANNING FOR THE MINISTRY

Within the fiscal year 2018-2020 Catholic Health Association's Strategic Plan is a goal to "be a catalyst to strengthen the Catholic identity of member organizations." One of the strategic initiatives to advance that goal is to "assist the ministry in talent development and succession planning in mission, pastoral care and ethics roles."¹ These positions, which require distinctive training and competencies, have been identified as critical to continuing the culture that is unique to Catholic health care.



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Members report to CHA that they are having an increasingly challenging time finding qualified candidates to fill these positions. Often positions are left vacant for more than a year, and because the talent pool is small, many times positions are filled from other member organizations. In addition, CHA data show that over the last two years, more than 200 mission leaders retired and that in the next three years, another 200 will retire. Similar trends are found among ethicists and chaplains. This has led the CHA Board of Trustees to make talent development and succession planning in mission, pastoral care and ethics roles a key strategic initiative over the next three years.

PROJECT LEGACY

To advance this strategy, CHA partnered with Emergent Success, Inc. to develop a comprehensive, tactical plan for addressing talent development and succession planning for mission, pastoral care and ethics roles in the Catholic health ministry. The endeavor, named "Project Legacy," began in April 2018 and gathered information from three sources:

- Confidential interviews with 51 sponsors, CEOs and system mission leaders that took place in May and June 2018.

- A survey sent to all member systems' human resources departments in August that was completed and returned by 28 systems of varying sizes and geographic locations.

- Three work groups comprised of CHA members that met from June to September to look at current and future needs in the areas of competency models, recruitment and compensation and career path.

Over 100 CHA members were involved in the information gathering phase of Project Legacy.

MAJOR FINDINGS

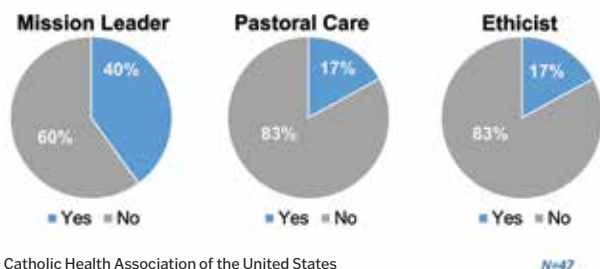
Interviews

Emergent Success conducted the confidential interviews of sponsors, CEOs and system mission leaders to ensure feedback was open and candid. Comments were summarized by Emergent Success so no one person or system can be identified. Those interviewed acknowledge the roles of mission leader, chaplain and ethicist are essential to ministry identity and to the Catholic health ministry's survival. The overall sentiment by key stakeholders is they are glad CHA is convening the membership to address this ministry-wide concern.

Many of those interviewed stated they are aware of the shortage of qualified candidates for these roles and they have discussed succession planning for their system. However, only a few members stated there were resources being dedicated to advance a success planning strategy (See graphic on page 60.) They cited competing priorities and limited resources as the reason succession planning has been delayed.

Many useful comments and suggestions emerged from the interviews. Sponsors stated they want recruitment, formation and retention of mission leaders, chaplains and ethicists to be a

Does your organization have a succession planning strategy for these roles?



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ministry priority with sustained and focused efforts. CEOs believe competency models need to be refreshed and aligned with the goals of health systems and scalable to fit different-sized CHA member organizations. System mission leaders suggested compensation models need to be aligned, fair and equitable for retention. In addition, this group believes internships, fellowships and entry-level positions must be dedicated to creating a pipeline immediately.

Human Resources Survey

The survey sent to all members' human resources departments asked for data from 20 different areas including: position descriptions, minimum specifications, salary ranges, benefits, average retirement age, turnover rates, time to fill vacant positions, where position openings are advertised, partnerships with higher education, presence of internships, fellowships and entry level positions in mission, ethics and pastoral care.

Data from the survey showed wide variation in position descriptions, minimum specifications and salary and benefits, especially for mission leaders. Turnover rates showed the widest variation. The annual turnover rate for mission leaders is between 14 to 37 percent; for ethicists, 5 to 20 percent; and for chaplains, 10 to 41 percent. The survey respondents indicated the average retirement ages for mission leaders is 62-70, for chaplains 64-75 and for ethicists 66-70.

Most of the systems that responded to the survey do not include professional development

within their benefits package; nor do they have academic partnerships, internships, fellowships or entry-level positions in mission, ethics or pastoral care. One surprising piece of information to emerge is that most of the systems who responded do not use the CHA website to advertise open positions in these areas. They currently use job websites like Monster, Indeed and Glassdoor.

Work Groups

The findings of the three work groups were more granular and offered practical, concrete steps that assisted CHA in the creation of a tactical plan. An overall finding of the work groups is that standardized job titles and position descriptions, with stair-stepped increasing responsibilities, accountabilities and competency development are needed in the ministry. The competency work group identified the need to update the mission leader competency model and add ongoing formation to all the competency models going forward. The recruitment work group suggested relationships with academic institutions be strengthened with focus on educating academic leaders and students about possible careers in Catholic health care. The compensation and career path work group recommended specific resources to assist people new in these

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roles, including mentors, and clear academic, formational and practical experience that will help them advance to the next level within their field.

Tactics for Advancing Project Legacy

Project Legacy also included an advisory committee of 20 members comprised of mission leaders, ethicists, human resources and talent development leaders from across the ministry. The advisory committee met on September 26, 2018,

and reviewed a draft of the major findings and initial recommendations created by CHA's mission services staff and Emergent Success. The group gave suggestions to CHA about how to refine the recommendations and prioritize the work going forward. From this input, CHA developed a tactical plan that was finalized in late January 2019 and shared with the CHA Board of Trustees, sponsors, CEOs and system mission leaders in February 2019. A summary of the tactical plan follows below. CHA will update members on the status of these tactics and how members can be involved as we address this ministry-wide concern.

Short-term (FY2019)

Educate the ministry on the newly revised CHA Ethicists in Catholic Health Care model (Responsible party: CHA).²

Create a single database on the CHA career webpage where positions and resumes can be posted. Market this page to member systems' human resources departments (Responsible parties: CHA and Members).

Share leading practices of systems that have created internships, fellowships and entry level positions (Responsible parties: CHA and Members).

Mid-term (FY2019 - 2020)

Update the CHA Mission Leader Competency Model and include professional and formational components (Responsible parties: CHA and Members).

Recruit and develop mentors to assist new mission leaders and ethicists (Responsible parties: CHA and Members).

Align job descriptions, competencies and certification requirements with responsibilities, accountabilities and compensation models (Responsible parties: CHA and Members).

Create a broad marketing strategy highlighting careers in mission, ethics and pastoral care (Responsible party: CHA).

Create a pool of internship and fellowship opportunities within member systems with the understanding this is creating a future pipeline for the entire ministry (Responsible parties: CHA and Members).

Long-term (FY2019-2021)

Ask academic programs to align their curriculum with recommended/needed competencies for these critical positions including professional, operational and strategic skills (Responsible party: CHA).

Systems will add entry-level mission, pastoral care and ethics positions and those filling them will work with and report to experienced colleagues, so they can learn how to advance in their career path (Responsible party: Members).

Create partnerships with Catholic higher education to draw attention to the newly created internships, fellowships and entry-level positions in mission, pastoral care and ethics (Responsible parties: CHA and Members).

Work with local dioceses, parishes and Catholic schools of higher education to promote lay vocations to Catholic health care including mission, ethics and pastoral care (Responsible parties: CHA and Members).

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NOTES

1. Catholic Health Association of the United States, FY2018-2020 Strategic Plan, <https://www.chausa.org/docs/default-source/default-document-library/strategic-roadmap-2018-2020.pdf?sfvrsn=0>.
2. Catholic Health Association of the United States, Qualifications and Competencies for Ethicists in Catholic Health Care, May 2018, <https://www.chausa.org/docs/default-source/ethics/ethicist-competencies-may-2018.pdf?sfvrsn=0>.

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