

# FAITHFULLY FORWARD

## TALENT DEVELOPMENT AND SUCCESSION PLANNING FOR MISSION, PASTORAL CARE AND ETHICS ROLES

### EXECUTIVE SUMMARY

#### BACKGROUND

Within the FY 2018 – 2020 Catholic Health Association (CHA) Strategic Plan is a goal to “be a catalyst to strengthen the 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.” These positions, which require distinctive training and competencies, have been identified as critical to continuing the identity, vision and culture that is unique to Catholic health care.**

Members report to CHA they are having an increasingly challenging time finding qualified candidates to fill these positions. Often these positions are left vacant for more than a year and sometimes members “recruit” talent from other member organizations. In addition, CHA survey data show the majority of people currently holding these positions plan on retiring within the next five years. 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.

#### OVERVIEW

To advance this strategy, CHA partnered with Emergent Success, Inc. in Project Legacy 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. Starting in April 2018, information was gathered from three sources:

##### SPONSORS, CEOS & MISSION LEADERS

MAY AND JUNE 2018

Phone interviews with 51 sponsors, CEOs and system mission leaders.

##### HUMAN RESOURCES

AUGUST 2018

Survey sent to the human resources department of all CHA member systems. Twenty-eight systems of varying size and geographic location completed and returned the survey.

##### COMPETENCIES, RECRUITMENT & COMPENSATION, CAREER PATHS

JUNE TO SEPTEMBER 2018

Three work groups held meetings to identify current and future needs in the areas of: competency models, recruitment and compensation, and career paths.

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The implementation of the tactical plan from Project Legacy is called “Faithfully Forward,” recognizing there must be both a regard for our tradition and a future orientation that helps the ministry flourish. Over 100 members have been involved in Faithfully Forward thus far, including an advisory committee comprised of mission leaders, ethicists, human resources and talent development leaders from across the ministry. The advisory committee reviewed the initial findings and top recommendations gathered by CHA’s mission services staff and Emergent Success, Inc., on September 26, 2018. The advisory committee provided CHA staff with a proposal for how to prioritize the work going forward. The tactical plan was finalized by CHA in early January 2019.



## MAJOR THEMES THAT EMERGED

- + Sponsors, CEOs and system mission leaders acknowledge that the roles of mission, pastoral care and ethics are essential to the Catholic identity of the ministry.
- + Recruitment, formation and retention of mission leaders, chaplains and ethicists must be a ministry priority with sustained and focused efforts.
- + System, regional and local leadership teams should be held accountable for talent development and succession planning of these critical roles as part of their talent stewardship.
- + Competency models need to be refreshed and aligned with the transformational direction of health care in our country and Catholic health care, recognizing these models must be scalable to fit different-sized CHA member organizations.
- + Clear job titles and position descriptions with stair-stepped increasing responsibilities, accountabilities and competency development and formation is needed.
- + Compensation models need to be aligned, fair and equitable for retention.
- + Internships, fellowships and entry-level positions are only found in a few member systems. Resources must be dedicated to creating a pipeline immediately.
- + The ministry needs to share best practices around recruitment, development, succession planning and retention since this is a ministry-wide concern.

## TOP RECOMMENDATIONS

### COMPETENCY DEVELOPMENT

- 1 Compliment core competencies for mission leaders, chaplains and ethicists with training in executive leadership, operational and strategic influence, culture building, change leadership and envisioning community health, population health and community relations in new and transformational ways.
- 2 Expand and deepen CHA's Mission Leader Competency Model and Ethicist Competency Model to include "stair stepped" competencies and career development that show a clear career path. In light of the changing landscape, understanding sponsorship models, canon law, ecclesial relations, principle of cooperation and value compatibility analysis will be necessary going forward.
- 3 Include personal formation and spiritual development as necessary components for leaders who hold these key positions.

### RECRUITMENT

- 1 Create a broad marketing strategy with academic institutions to educate young adult students about these critical roles.
- 2 Create a database where job openings across the ministry and resumes of interested candidates can be posted.
- 3 Encourage member systems to create internships, fellowships and entry-level positions.

### COMPENSATION AND CAREER PATH

- 1 Identify and develop mentors who can accompany new mission leaders, chaplains and ethicists during the first five years of their professional life.
- 2 Develop clear career paths and educate new leaders so they know overall professional competencies, role-specific competencies and the formational and spiritual development necessary to advance.
- 3 Align system goals, responsibilities and compensation for these roles in an equitable manner consistent with other leaders within the system.

## TACTICS FOR ADVANCING RECOMMENDATIONS

### SHORT-TERM (FY2019)

- + Educate the ministry on the newly-revised CHA Ethicist Competency Model. (CHA)
- + 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. (CHA AND MEMBERS)
- + Share the leading practices of systems who have created internships, fellowships and entry level positions. (CHA AND MEMBERS)

### MID-TERM (FY2019 – 2020)

- + Update the CHA Mission Leader Competency Model (CHA) and include professional and formational components. (CHA)
- + Recruit and develop mentors to assist new mission leaders and ethicists. (CHA AND MEMBERS)
- + Align job descriptions, competencies and certification requirements with responsibilities, accountabilities and compensation models. (CHA AND MEMBERS)
- + Create a broad marketing strategy highlighting careers in mission, ethics and pastoral care. (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. (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. (CHA)
- + Systems will add entry-level mission, pastoral care and ethics positions who work with and report to experienced colleagues, so they can learn how to advance in their career path. (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. (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. (CHA AND MEMBERS)



*The succession planning priority for these roles needs to move from 'recommendation' to 'expectation.'*

**SPONSOR BOARD MEMBER**

*We have admired this problem for years. The first step is this dialogue, but can we create sustainable working models that will not be compromised during fiscal debates?*

**MEMBER CEO**



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