



Project Legacy: Update on Succession Planning

BRIAN SMITH, MS, MA, M.Div.
Senior Director, Mission Innovation and Integration
Catholic Health Association

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Background

- CHA's FY2018 – 2020 Strategic Plan
- Critical Conversations 2018
- “Assist the ministry in talent development and succession planning in mission, pastoral care and ethics roles.”

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Project Legacy Overview

- Partnered with Emergent Success, Inc.
- Inquire and Imagine Phase (*April – Aug. 2018*)
- Advisory Committee feedback (*Sept. 2018*)
- Tactical plan developed

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Inquire and Imagine Phase

- Key stakeholder interviews
- Three work groups
- HR data survey

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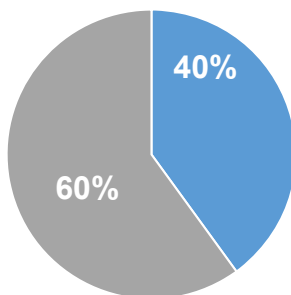
Key Stakeholder Interviews

- These roles are essential to Catholic identity.
- Recruitment and retention need to be top priorities of sponsors and CEOs.
- Competing priorities have delayed a focused effort.
- Compensation models and scope of responsibilities need to be aligned, fair and equitable for retention and recruitment.

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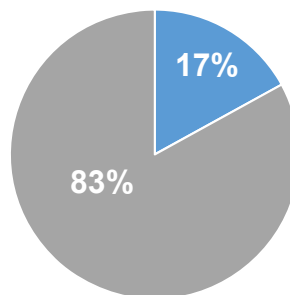
Does your organization have a succession planning strategy for these roles?

Mission Leader



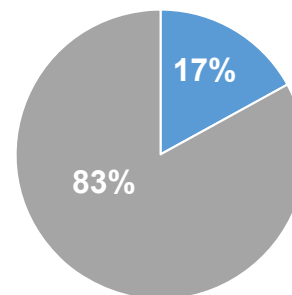
■ Yes ■ No

Pastoral Care



■ Yes ■ No

Ethicist



■ Yes ■ No

N=47

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Work Groups

- Competency
- Recruitment
- Compensation and Career Path

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Competency

1. Complement core competencies with training in executive, operational and business health care leadership.
2. Expand CHA mission leader and ethicist competency models to include stair steps that show a clear career path.
3. Include personal formation and spiritual development for leaders in these roles.

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Recruitment

1. Create broad marketing strategy with academic institutions.
2. Create a database where job openings and resumes can be shared.
3. Encourage member systems to create internships, fellowships and entry-level positions.

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Compensation and Career Path

1. Identify and develop mentors to accompany new leaders during first five years of professional life.
2. Develop career paths with role-specific competencies needed to advance.
3. Align system goals, responsibilities and compensation for these roles in an equitable manner.

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HR Data Survey

- All CHA member systems' HR were sent the survey.
- 28 systems of various sizes and locations replied.
- 21 data points collected.

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HR Survey Findings

- Many members do not post job openings on CHA website.
- Stair-stepping of competencies, responsibilities and compensation are not consistent.
- Most systems do not have professional development benefit for these roles.

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HR Survey Findings

- Wide variation in turnover and replacement rates.
- Few academic partnerships, internships, fellowships and entry-level positions.

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Advisory Committee

- The ministry needs competent leaders in these key roles to maintain Catholic identity.
- Recruitment, formation and retention of these key individuals must be a priority with focused effort.
- Senior leaders must be accountable for talent development and succession planning as part of their at-risk compensation.

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Advisory Committee

- Competency models need to be refreshed and aligned with goals of health systems and scalable to fit different CHA members.
- Clear job titles, position descriptions with stair-stepped responsibilities, accountabilities, competency development and formation are needed.
- Compensation models need to be aligned, fair and equitable for retention.

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Advisory Committee

- Resources must be dedicated for internships, fellowships and entry-level positions to immediately create a pipeline.
- Ministry needs to share best practices around recruitment, development, succession planning and retention.
- This is a ministry-wide concern requiring a ministry-wide response.

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Tactical Plan – Short Term

- Educate ministry on new CHA Ethicist Competency Model. *(CHA)*
- Create CHA database for job openings and resumes of candidates, market to members' HR departments. *(CHA)*
- Share leading practices of systems who have created internships, fellowships and entry-level positions. *(CHA and members)*

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Tactical Plan – Mid Term

- Update CHA Mission Leader Competency Model and include professional and formational components. *(CHA)*
- Align job descriptions, competencies and certification requirements with responsibilities, accountabilities and compensation models. *(CHA and members)*

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Tactical Plan – Mid Term

- Create a broad marketing strategy highlighting careers in mission, ethics and pastoral care. *(CHA)*
- Recruit and develop mentors to assist new mission leaders and ethicists. *(CHA and members)*
- Create a pool of internship and fellowship opportunities within member systems with the understanding this is a future pipeline for the entire ministry. *(CHA and members)*

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Tactical Plan – Long Term

- Ask academic programs to align their curriculum with recommended/needed competencies for these critical positions including professional, operational and strategic skills. *(CHA)*
- Systems will create entry-level mission, pastoral care and ethics positions that will work with and report to experienced colleagues, so these entry-level associates can learn how to advance in their career path. *(Members)*

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Tactical Plan – Long Term

- Develop and deepen 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)*
- Partner with local dioceses, parishes and Catholic schools of higher education to promote lay vocations in the health care ministry. *(CHA and members)*