

FUTURE OF NURSING™

Campaign for Action



Succession Planning. Bringing Up Tomorrow's Leaders

Webinar Summary

February 9, 2016

Presenters:

Winifred V. Quinn, PhD Director, Advocacy & Consumer Affairs *Center to Champion Nursing in America at AARP*

Melanie Brim, MHA President & CEO of the Michigan Health Council and Co-lead of the Michigan Action Coalition

Jana R. Bitton MPA Executive Director of the Oregon Center for Nursing & Co-lead of the Oregon Action Coalition

Alexia Green, RN, PhD, FAAN Professor and Dean Emerita Texas Tech University Health Sciences, Founding Co-Lead, Texas Action Coalition, Consultant, CCNA

Goals

- Discuss the benefits of succession planning.
- Dialogue with 3 Coalition Leaders who have successfully supported leadership transitions.
- Identify tactics you need to take to prepare your Action Coalition for succession planning.

Across the country, there is a movement to advance the field of nursing so that all Americans have access to high quality, patient-centered care in a health care system where nurses contribute as essential partners in achieving success. This national level [Future of Nursing: Campaign for Action](#) is a result of the Institute of Medicine's landmark 2010 report on the [Future of Nursing: Leading Change, Advancing Health](#).

The *Campaign for Action's* field-based teams, the [Action Coalitions](#) (ACs), are leading this movement and are equipping themselves with knowledge gained from technical assistance provided by the Center to Champion Nursing in America (CCNA), a joint initiative of AARP, the AARP Foundation, and the Robert Wood Johnson Foundation. Such technical assistance comes in the form of webinars, face to face interactions, and other facilitated engagements with public policy leaders, content experts, consultants, and Action Coalition peers across the country.

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Winifred Quinn of CCNA

She asked the Action Coalitions to think about several questions:

Has your coalition developed a succession plan?

Are there potential leaders in your coalition who should be mentored and provided leadership opportunities?

These questions and others will be considered by coalition leaders who have successfully made smooth leadership transitions.



Alexia **Green** , founding Co-lead, Texas Action Coalition.

Green noted the aspects of high impact succession planning:

- ✓ Best practice were derived from work by the Center for Creative Leadership and focused on organizations – not specifically action coalitions.

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- ✓ Best-Practice Coalition's Address Succession Planning Consistently across All Key Leadership Positions of the Action Coalition
- ✓ Development Planning is Key to Success
- ✓ Good Succession Management Is Clearly Correlated to Action Coalition Success.

* Derived from "High Impact Succession Planning" – the Center for Creative Leadership

Green presented the key concepts behind the Texas Action Coalition succession planning:

- Addressed Succession Planning Consistently across All Key Leadership Positions of the Action Coalition. "You need to think broadly beyond current office-holders."
- Development Planning was Key to Success – Special Focus on Regional Nurse Leaders, who were younger and represented the next generation.
- Built in Succession Planning & Development Planning as a Core Value of Texas AC



Choose individuals with time commitment and commitment to succeed

Development – groomed Regional Nurse Leaders (younger leaders) by integrating them into Executive Leadership meetings at least once annually. Preparing them for transition to Executive Committee as opportunities/openings arose.

Core Value – identified at least one year ahead of transition when possible

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Melanie **Brim**, a Michigan Action Coalition Leader, talks about succession planning in her state.

Michigan's Action Coalition History

- ✓ One of the first Action Coalitions, Michigan was launched in 2010
- ✓ But they went on hiatus in 2013 because of
 - Lack of stakeholder engagement
 - Loss of non-nursing co-lead organization
 - Departure of nursing co-lead designee
- ✓ The coalition did a "Re-boot" in August 2014
- ✓ Leadership change in May 2015
- ✓ Action plans in place in October 2015
- ✓ Retooling for a Culture of Health in 2016

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**“Get the right
people on the
bus,” Melanie
Brim of
Michigan.**

Lessons Learned

- Make sure the infrastructure will support the work of the coalition
 - Understand the role, function, and expectations of a coalition
 - Build and sustain momentum to assure continuity and longevity
 - Continually engage with stakeholders
- Express appreciation to those who are volunteering their time, expertise and resources

Building Action Coalition Capacity

- Co-lead organizations—what happens if a co-lead organization decides to step away
- Co-lead organizational leaders
- Steering Committee
- Action team leadership
- Action team members

Strategies for Successful Planning

- **Recruitment**
 - Value Proposition
 - Talent Inventory—is there diversity at every level --
 - Talent Acquisition Plan—30 percent of nurses are over 55; 20 percent under 35. These numbers don't reflect the general population.
 - Implementation Plan
 - Re-check
 - **Leadership Development**
 - Mentorship
 - Leadership training programs
 - Volunteer opportunities
 - Focused conversations
- **Retention**
 - Valid value proposition
 - Meaningful work
 - Achievable results
 - Supportive culture – keep members engaged
 - Clear delineation of roles and responsibilities

- Ongoing communication with stakeholders on an individual basis
- Appreciation for contributions



Jana **Bitton**, co-lead of Oregon Action Coalition

Preparing for the Inevitable

- Focus on momentum and volunteer engagement.
- Have a strategic plan. Know where you are going. Work should be meaningful; members should be developed as leaders
- Have a solid team culture in place where members support each other, and can lead the work without a co-lead.
- Have the program work clearly documented.

Three Ways to Think About Succession Planning

Build from within

- Assemble a team of talented individuals who can take over as leader
- Make sure the roles of the co-lead are clearly defined. This is critical so they know where they are headed.

Emergency Succession Planning

Have a solid back-up plan:

- Make sure the roles of the co-lead are clearly defined
- Agree what functions will be covered by the interim co-lead(s)
- Agree on how the interim co-lead(s) will be supported
- Create a communications plan in the event the transition is sudden and immediate

Defined letting go

The leadership of letting go:

- Set clear expectations of the transition
- Be clear on the strategic long-term vision
- Identify any vulnerabilities and build leadership capabilities as needed
- Celebrate the work of the co-lead

Where Are We Now?

CAMPAIGN IMPERATIVES:

- Moving **BEYOND** Nursing!
- Must deliver short term **RESULTS** → while developing long range plans!
- Must have the **COURAGE** to place the right **LEADERS** at the helm – remove weak or ineffective **LEADERS**
- Must have **FUNDING** to sustain work
- Must not ignore **DIVERSE** stakeholders critical to success

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AC Coalition Membership Resources available:

<http://campaignforaction.org/resource/>

- [Annie E. Casey Foundation Succession Planning Monographs](#)
- [CompassPoint Resources](#)
- [Sample Succession Plan](#)
- [“High Impact Succession Planning” – the Center for Creative Leadership \(2009\)](#)

Coalition Building and Sustainability Learning Collaborative WebEx Every 2nd
Tuesday of Month

Next Webinar, March 2016: Date and Time TBD

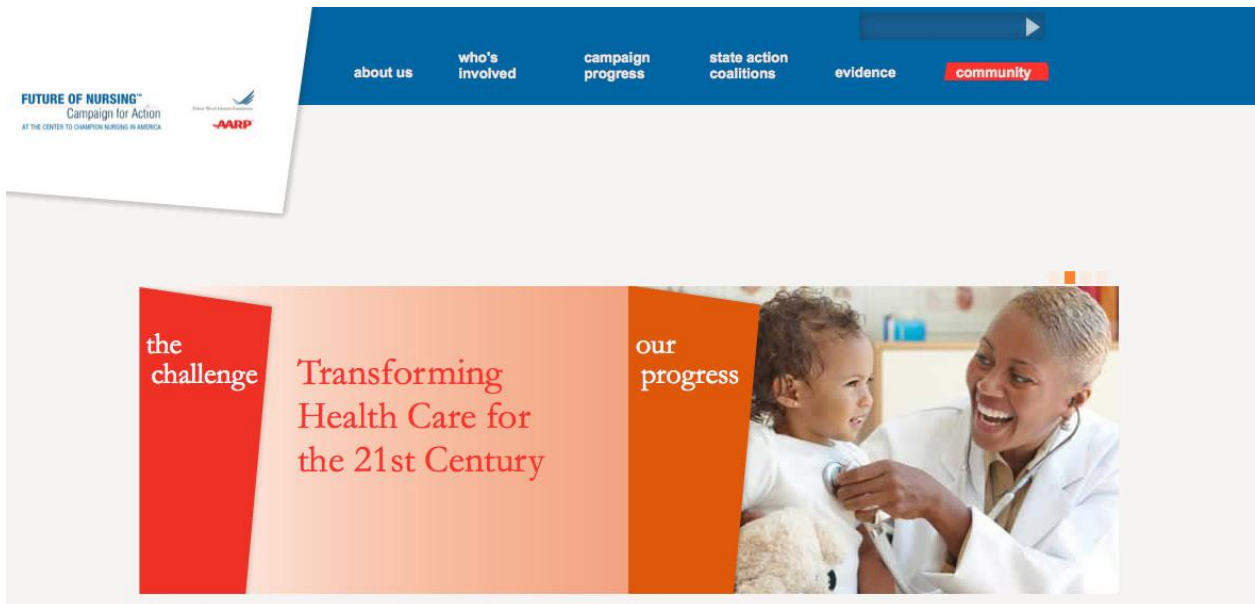
Time 2:00 PM ET – 3:00 PM ET

Topic: **Fundraising and Coalition Building**

Presented by: Campbell and Company

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The IOM's recommendations include: the need for more advanced education of registered nurses; nurses leading innovations in health care and being appointed to decision making bodies; all nurses practicing to the full extent of their education and training; a more diverse nursing workforce and faculty; and more interprofessional collaboration among nurses, physicians, and other members of the health care team in the educational and clinical environments.

For more information from the Center to Champion Nursing in America about this webinar, technical assistance or other questions related to the Future of Nursing, Campaign for Action contact Natalie Moulding at nmoulding@aarp.org or Madeline O'Brien at mobrien@aarp.org

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