Succession Planning: Bringing up Tomorrow’s Leaders

February 9, 2016
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Alexia Green RN, PhD, FAAN
Melanie Brim MHA
Jana Bitton MPA
Today’s Webinar

• 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 AC for succession planning.

• Q&A

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

www.campaignforaction.org/webinars
Today’s Guest from Michigan

Melanie Brim, MHA
President & CEO of the Michigan Health Council and Co-lead of the Michigan Action Coalition
Today’s Guest from Oregon

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 AC Consultant, CCNA
High Impact Succession Planning

• Best-Practice Coalition’s Address Succession Planning Consistently across All Key Leadership Positions of the AC

• Development Planning is Key to Success

• Good Succession Management Is Clearly Correlated to AC Success.

* Derived from “High Impact Succession Planning” – the Center for Creative Leadership (2009)
Texas AC Succession Planning

• Addressed Succession Planning Consistently across All Key Leadership Positions of the AC

• Development Planning was Key to Success – Special Focus on Regional Nurse Leaders

• Built in Succession Planning & Development Planning as a Core Value of Texas AC
The Michigan AC Experience
Melanie Brim, MHA
President & CEO, Michigan Health Council
Michigan Center for Nursing
Michigan AC Leader
Historical Perspective

- Michigan’s AC History
  - Initial launch in 2010
  - On hiatus in 2013
    - Lack of stakeholder engagement
    - Loss of non-nursing co-lead organization
    - Departure of nursing co-lead designee
  - “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
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
- Co-lead organizational leaders
- Steering Committee
- Action team leadership
- Action team members
Strategies for Succession Planning

• Recruitment
  – Value Proposition
  – Talent Inventory
  – Talent Acquisition Plan
  – Implementation Plan
  – Re-check

• Leadership Development
  – Mentorship
  – Leadership training programs
  – Volunteer opportunities
  – Focused conversations
Strategies for Succession Planning

- **Retention**
  - Valid value proposition
  - Meaningful work
  - Achievable results
  - Supportive culture
  - Clear delineation of roles and responsibilities
  - Ongoing communication with stakeholders on an individual basis
  - Appreciation for contributions
  - Make it fun!
The Oregon AC Experience

Jana R. Bitton, MPA
Executive Director, Oregon Center for Nursing
Co-Lead, Oregon Action Coalition
OCN and OAC Leadership Changes

Ch-ch-ch-changes.
Preparing for the inevitable

• Focus on momentum and volunteer engagement.
• Have a strategic plan. Know where you are going.
• 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
Strategic Leader Development:

Build from within

- Get the right people on the bus
- Assemble a team of talented individuals who can take over as leader
- Make sure the roles of the co-lead are clearly defined
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
Departure-Defined Success Planning:

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?
Closing Thoughts

CAMPAIGN IMPERATIVES:

• Moving BEYOND Nursing!
• Must delivery 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
Questions or Comments?

Press *1 on your telephone key pad to ask a question
OR
Use the “chat” feature to send “everyone” a question.

You can find the recording, webinar summary, and additional resources by going to: www.campaignforaction.org/webinars.
AC Coalition Membership Resources available here:

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)
Monthly Webinar Series

Coalition Building and Sustainability Learning
Collaborative WebEx Every 2\textsuperscript{nd} Tuesday of Month

Next Webinar, March 2016: Date and Time TBD
Time 2:00 PM ET – 3:00 PM ET

Topic: \textit{Fundraising and Coalition Building}
Presented by: Campbell and Company