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Succession Planning in Healthcare Organizations

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Succession Planning

in

Healthcare Organizations

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By

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SIGNATURE PAGE

This research paper was prepared by Stephanie U. Cross under the direction of

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ACKNOWLEDGEMENTS

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CHAPTER I

INTRODUCTION

Succession planning offers many benefits to organizations. A climate of stability is maintained when the transition between top level leaders occurs smoothly. There is a transfer of leadership and human capital. This is perceived internally by employees, as well as externally, by the public. With succession planning, there is an increased likelihood that the organization's strategic vision will be maintained because the next leader has been groomed with existing leadership still in command. Not preparing for inevitable change places an organization at risk, another reason for this ongoing process. It makes good business sense to apply this systematic approach of leadership development to healthcare organizations and to more than just top level leaders.

Inova Loudoun Hospital, part of Inova Health System, located in Lansdowne, Virginia, has made leadership development a high priority over recent years. This could serve as a foundation for implementing a succession plan. The goals of this study address initial concerns and support the purpose of creating a succession plan model for use in healthcare.

STATEMENT OF PROBLEM

The purpose of this study was to evaluate the effectiveness of succession planning in healthcare organizations to determine how it should be implemented at Inova Loudoun Hospital in Lansdowne, Virginia.

RESEARCH GOALS

To answer this problem, the following questions were established:

1. What are best practices when implementing a succession plan?

2. What considerations exist when implementing a succession plan in a healthcare organization?

3. What types of leadership development have been practiced when implementing succession planning programs?

4. What are the financial considerations when implementing a succession planning program in a healthcare organization?

5. What perceived gaps in leadership development exist at Inova Loudoun Hospital?

BACKGROUND AND SIGNIFICANCE

As "baby boomers" retire, depleting the workforce, organizations need a current strategy in place to survive, let alone stay ahead of their competitors. It is the responsibility of leaders to remain open and transparent to develop future leaders (Wagner, 2007). Human capital in health care organizations is an important asset and is often the reason a successful organization stands out (Coonan, 2005). Succession planning offers a smooth transfer of knowledge and ensures that there are successors in place to fill key positions. Succession planning can be applied throughout the organization. Historically, healthcare employees with exemplary technical skills were promoted into leadership roles. However, technical skill does not equate to leadership ability. Without proper leadership development, many of these talented individuals do not succeed in their new role (Collins & Collins, 2007).

Recent research has shown that a majority of hospitals in the United States do not conduct succession planning (Garman & Tyler, 2007; Stephens, 2006). Garman and Tyler (2007) studied hospital systems and system-affiliated hospitals in the United States and found that the routine use of succession planning was taking place in 49 percent of

hospital system headquarters and in only 33 percent of hospitals that are part of systems. These findings are encouraging, compared to results the authors obtained in 2004, in which 21 percent of freestanding hospitals practiced succession planning. The authors remain optimistic in pointing out that although the prevalence of succession planning in hospitals is low, there is an increase in its perceived importance among the respondents to their survey (Garman & Tyler, 2007).

Inova Health System has placed an emphasis on leadership development, which resulted in the formation of the Inova Leadership Institute (ILI). Since implementation in 2006, all employees designated as leaders, including those at Inova Loudoun Hospital, have been required to attend ILI, a mandatory day long conference occurring every three months. If the employee was unable to attend, then they were required to view the session on video. All leaders new to Inova after the implementation of ILI were required to attend a Leadership Immersion class, serving as an onboarding program.

The Studer Group offers nine principles of service and operational excellence to function as a guide for healthcare leaders. Inova Health System adopted these principles and educated all leaders about them. Additionally, tools to use when implementing these principles were provided. 'Creating and developing great leaders', the fourth principle, is based on the theory that leadership competencies are taught to increase knowledge and skills and to serve as a catalyst for culture change (Studor, 2003). The goal was for the organization to become more effective and positive as strong leaders were developed and exemplified positive behavior. Consistent with the principles that have been implemented and taught at Inova's ILI, succession planning would allow current leaders in the organization to develop effective leaders.

Differences exist such that there is not one succession planning system that meets the needs of every sector and every organization. If a hospital or healthcare system wants to implement a succession plan, it is important for the specific needs related to the health sector and the mission, vision, and values of the individual hospital or system to be considered. Inova Loudoun Hospital differs from other facilities within the Inova Health System. It is a 155-bed acute care community hospital located in Loudoun County, Virginia.

It is evident that today's resources are limited and competition exists for priorities, making it necessary for healthcare organizations to increase performance and productivity while maintaining a workforce of quality, safety, and excellence. At minimum, organizational factors affecting a succession plan and desired outcomes would be specific to each organization. The implementation of a succession plan requires an ongoing commitment.

LIMITATIONS

The following limitations were recognized to have an effect on this study:

1. Only leadership at one non-profit healthcare organization in Loudoun County, Virginia, was surveyed.

2. Evaluation of attitudes was limited to a sample population of forty employees in leadership positions.

ASSUMPTIONS

The results of this study were based on the following assumptions:

1. Succession planning was viewed as one part of talent management.

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2. Succession planning was viewed as benefitting outgoing and incoming leaders and managers.

3. Some amount of leadership development is offered by Inova Loudoun Hospital.

4. The primary responsibility of a leader was perceived as creating a strategy to achieve the mission of an organization.

5. The primary responsibility of a manager was perceived as implementing the steps to achieve the leader's vision.

PROCEDURES

The procedures required for this research involved obtaining information on healthcare organizations that have implemented successful succession planning. From this, best practices of successful succession plans as well as leadership development activities, and financial considerations were investigated. Examples of succession plan models were found. A survey was developed and distributed to sixty-eight leaders at Inova Loudoun Hospital at a monthly Management Forum meeting. The data received was used to assess current leadership development offered. The survey included questions that addressed perceived obstacles to leadership development, as well as those experiences that were believed to be beneficial. Based on this data, recommendations for implementing a succession planning program at Inova Loudoun Hospital were developed. The prepared model was presented to the Director of Human Resources at Inova Loudoun Hospital.

DEFINITION OF TERMS

The following terms are defined to ensure that the readers of this study understand their meaning:

1. Succession Planning – the structured process of preparing identified employees to fill key organizational roles, while that role is still filled.

2. Talent Management – the process of attracting and developing new employees, developing and retaining current employees, and attracting highly skilled employees to an organization.

3. Health Care Organization – a group of people, organized for the purpose of delivering goods and services to meet the health care needs of a population, providing care in a variety of settings.

4. Inova Health System – a not-for-profit health system located in Northern Virginia.

5. Leader in the Inova Health System – an employee who supervises people, or plays a major role in the growth, development, strategy, or operation of an operating unit.

6. Organizational Development – a service of human resources that facilitates staff and organization development by providing training opportunities so that employees at all levels can develop skills and competencies.

7. Organizational Factors – leadership and governance issues (e.g., history, time frame, labor market, and political climate) that affect the succession process.

8. Succession Practices – the succession process itself, from identifying to preparing the successor.

9. Outcomes – measureable items used to determine success.

OVERVIEW OF CHAPTERS

This chapter cited the benefits of a succession planning program, as well as Inova Health System's commitment to leadership development. The idea that a succession plan

is needed to ensure consistency in an organization's strategic vision, if a change in leadership should occur, was introduced. Goals were included, in the form of questions, as a framework to guide this study. The procedures used to answer these questions were given, including survey distribution, recommendations of succession planning implementation, and distribution for feedback. This study was limited to a population of employees in leadership positions at one non profit healthcare organization that is part of a larger hospital system. Assumptions made by the researcher in this study were specified. These included the beliefs that succession planning is beneficial and is part of talent management. It was assumed that some leadership development is currently being offered at Inova Loudoun Hospital. Also, the presumed difference between a leader and a manager were provided. Finally, definitions of terms relevant to this study were listed.

The review of literature in Chapter II will discuss research on the implementation of succession plans in healthcare organizations. Examples of existing succession models will be provided. Chapter III will detail the methods and procedures used to collect research data in this study. The findings from the research and data will be presented in Chapter IV and recommendations for succession planning at Inova Loudoun Hospital will be provided. Finally, Chapter V will summarize the findings and make conclusions based on findings from this study. Recommendations for further research in the use of succession plans at Inova Health System will be offered.

CHAPTER II

REVIEW OF LITERATURE

Chapter I introduced the concept of and established the need for succession planning. This chapter will address the goals that were established in Chapter I through a review of literature. Specifically, a summary of the overall best practices of successful succession planning is provided. Next, succession planning in healthcare organizations is discussed. Several best practices for leadership development activities are offered. The literature review in this chapter exposes the financial considerations for healthcare organizations to consider when launching a succession plan. Lastly, examples of succession planning models are provided.

SUCCESSION PLANNING BEST PRACTICES

In this subsection, overall best practices of the succession planning process are discussed. In a later subsection, specific leadership development practices in succession planning will be offered. When organizations adopt best practices, the succession process becomes an integral part of the corporate culture (de Koning, 2005).

The collaboration between several departments within an organization is critical in succession planning. In order for a succession plan to thrive, it must have the support of the senior executive leaders. They provide the guidance on talent needed in the organization based on anticipated strategic long-term goals (Shirey, 2008; Green & Downes, 2005). The Human Resources Department should support the succession process, but the management team needs to own it (de Koning, 2005). The identification of high potential employees should be a joint effort between Human Resources and managers (Karaevli & Hall, 2003). Succession management is an ongoing planning

process with a clear purpose. This best practice includes staffing review, where leadership teams meet quarterly or semi-annually to discuss performance, needs, and strategies for developing high-potential leaders (de Koning, 2005).

The process of a succession plan begins with the premise that effectiveness depends largely on what we know and how we use this knowledge to address organizational challenges. There should be a focus on giving future leaders the tools, techniques, and expertise to be problem solvers. There needs to be an emphasis on how we learn, knowing how to ask the right questions, how to master new information quickly, and how to exercise judgment in complex and uncertain situations. The talent management of progressive organizations develops learning agility, and equips leaders with the tools of problem analysis, creative thinking, and decision-making (Munro, 2005).

The succession process should include experiential learning. It is more important to develop a person's ability to learn from experience rather than focus on competencies, especially if it is difficult to know what skills and abilities will be needed in the future, or if competencies become outdated quickly (Karaevli & Hall, 2003).

The process should be simple, making it user friendly, and reducing advanced preparation and paperwork. If the succession planning process leads to the creation of a big binder containing the plans for development of each high potential manager, then the succession plan is too complex (Karaevli & Hall, 2003). The use of elaborate forms and processes can dominate the key function of developing leadership talent (de Koning, 2005). The succession planning process should be decentralized, offering a basic tool for

each unit to tailor to their individual culture, needs, and core competencies (Karaevli & Hall, 2003).

The talent development process should be individualistic (Karaevli & Hall, 2003). All leaders being developed should not have the same expectations and job rotations. They should be individualized to that leader's talents and developmental needs. This can be accomplished through the use of individual development plans (Charan, 2008).

The focus should be on developing large pools of employees (Karaevli & Hall, 2003). By making succession planning inclusive, a large pool of leadership talent is developed, versus one or two candidates (Koning, 2005). Companies need to ensure that leadership development creates a talent pool that could lead in an environment not yet foreseen (Charan, 2008).

SUCCESSION PLANNING IN HEALTHCARE ORGANIZATIONS

The shortage of healthcare workers, increase in demand for healthcare services, and emphasis on excellence in patient care and safety, all support the need for succession programs in healthcare organizations. Literature suggests that healthcare organizations lag in succession planning and when a succession plan does exist, it targets executive leadership positions, without including clinical leadership roles. Research on succession planning in healthcare is limited, and even more so on its use deeper into the organization (Shirey, 2008).

The skills of future leaders need to be considered. New healthcare managers typically have weaknesses in the areas of finance and leadership. There needs to be a focus on fiscal language and measures and standards for accountability, as the education received for a clinician's specialty often does not include this. An investment in

providing this education will contribute to the employee's success in achieving expectations for fiscal and clinical performance that they will be held accountable for in their new role (Dienemann, 2005). They need to be shown that weaknesses on the business side affect the patient-care side of the industry. In a service oriented industry such as healthcare, the correlation between the two sides needs to be understood, as employees and new leaders in healthcare are often driven by the patient-care-side (Collins & Collins, 2007).

LEADERSHIP DEVELOPMENT BEST PRACTICES

The argument that there is no time for leadership development carries an assumption that it is a separate activity from doing work. This would be true if leadership development were just classroom-based activities. It should be occurring naturally, as part of everyday business (Karaevli & Hall, 2003). In a previous subsection, overall best practices of the succession planning process were discussed. In this subsection, specific leadership development best practices in succession planning are offered.

Producing other leaders should be part of every leader's job. This includes offering a variety of challenges to their particular strengths and needs, closely monitoring the talents and limitations that emerge, and providing ongoing feedback. These emerging leaders become change agents in the organization by grasping opportunities and strengthening competitive instincts. Such leadership development allows leaders at all levels to maximize the talents they have (Charan, 2008).

Self-assessment should be used as a tool by the developing leader to guide the goals of their leadership activities (Heller et al., 2004). Rather than focusing solely on an individual's limitations, there is gain from playing to their strengths. The reasoning is that

strengths emerge out of one's talents, which are fundamental. Also, individuals can not operate at their full potential until they recognize and face the weaknesses that hold them back. The strategy of the succession planning process should focus on the recognition of existing strengths and limitations, and the self-management to know that strengths in one situation may be counter-productive in another situation (Munro, 2005).

The developing leader should be given opportunities for stretch assignments. Stretch assignments do not always have to be upwards, but can be sideways, to a job outside of the leader's functional discipline, which would still stretch them. The goal of this type of stretch assignment is not to master a new discipline, rather to get a better view of the organization as a whole, and bring about new insights and innovations (Charan, 2008).

Classroom education should supplement real-world experiences (Charan, 2008). Partnerships between the organization and institutions of higher learning, education benefits, journal clubs, research councils, and involvement in professional organizations in addition to didactic learning create a synergy (Shirey, 2008).

Developing leaders should be allowed to make crucial connections through reflection. Reflection involves self-examination by looking back over what happened in practice with the goal of professional growth. This can be accomplished through individual or group activities such as journals, writing exemplars, reflective case studies, critical incident analysis, or a portfolio that demonstrates achievement of learning competencies. The emotionally competent and reflective leader moves beyond self-awareness and considers group processes and ways to integrate the emotions of others.

Over time he/she uses this understanding to gain greater self-control and manage his/her own feelings and responses to others (Horton & Sherwood, 2008).

The use of mentoring/coaching is beneficial. As leaders are developed, it is important they receive ongoing feedback and coaching with their learning experiences (de Koning, 2005). These experiences are used to provide insight into the elements of leadership in healthcare organizations: leading, managing, communicating, decision making, and thought processes at the system level.

The talent identification process needs to be flexible in regards to formality. Common tools used to identify high potential employees include performance appraisal results, 360-degree feedback, and competency assessment (Karaevli & Hall, 2003). High-potential leaders should be recognized early and given consistent and clear direction about what the organization considers to be the earmarks of leadership potential (Charan, 2008). Rounding between leaders, managers, and staff increases communication and assists current leaders in the organization to recognize those with potential. Behavioral interviewing is another method of revealing actions, decisions, and behaviors of potential leaders.

FINANCIAL CONSIDERATIONS

Healthcare organizations need to identify their costs and monitor fiscal efficiency. Among several factors, this is challenged by changes in billing and payment, documentation, as well as staffing ratios, employee turnover rates, recruitment and orientation costs, rate of certified competencies, career development costs, vacancy time before hire by position, overtime and temporary personnel costs, and rate of job-related injuries and illnesses (Dienemann, 2005). Succession planning deeper into the

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organization addresses some of these issues. The process can attract and retain engaged employees, and keep them motivated throughout their professional career. This should be viewed as a return on investment and a good business strategy by executive leadership (Shirey, 2008).

It is important to support organizational employee development initiatives because they are integral to employee moral and job satisfaction. Employers who choose to offer such support may have improved employee retention and job satisfaction, and may see lower costs. With higher retention rates, there are fewer hours spent training new employees. By supporting employee development, an organization builds both a learning culture, and a competitive advantage (Rothwell et al, 2005).

One large *for-profit* hospital network in the United States encountered successes by improving their employee engagement. For example, they experienced a significant reduction in absenteeism costs and staff turnover. Over a three-year period, as employee engagement levels rose, so did their stock price. They employed Gallup Business Impact Analysis to evaluate the correlation between engagement levels and business outcomes. The consultants discovered that hospitals with lower employee engagement levels had more malpractice claims per year than did hospitals with the highest employee engagement (Gallup, 2009).

SUCCESSION PLANNING MODELS

The following succession planning models were found in this literature review. Figure 2.1 divides succession planning into three processes. First, Leadership and Governance factors affecting the succession process are provided. Those factors that affect decisions made by the hospital's board and/or senior leadership on whether and

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I. Leadership & Governance Factors

- Historical precedent
- Planning time horizon
- Perceptions of internal labor market
- Political climate
- Openness / Transparency

II. Succession Planning Practices

Successor identified

- Successor preparation
  - Socialization
  - Development

- Succession process
  - Length
  - Depth
  - Formality

- Identification process
  - Decision-makers
  - Selection criteria
  - Assessment methods

- Decision to identify a successor

Successor Assumes role

III. Organizational Outcomes

- Internal perception
  - Stability
  - Fairness

- Public perception
  - Stability
  - Effectiveness

- Organizational performance
  - Survival
  - Valuation
  - Profitability

Figure 2.1. An integrated model of the succession planning process (Garman & Tyler, 2007)

how succession planning should be conducted are included. Next, Practices, or the succession process itself, is shown. The practices most commonly used with the succession planning process are listed, as factors will vary considerably from organization to organization. Finally, the associated Organizational Outcomes are provided (Garman & Tyler, 2007).

Figure 2.2 provides a 5-step succession planning model that incorporates clinical nurse specialists into the leadership development pipeline. The internal environment includes a framework that exists within the hospital and the external environment includes the community, region, state, and national levels influenced by regulatory and sociopolitical forces. The five steps of succession planning included in the model are organizational factors, individual factors, development, execution, and evaluation/dissemination. The bulleted items listed below each step are key elements (Shirey, 2008).

SUMMARY

In summary, the review of literature in this chapter addressed the research goals of this study. Best practices of the succession planning process were provided. These consisted of having the support of senior executive leaders and the Human Resources Department, creating an ongoing process, and operating on the premise that effectiveness is largely based on how a leader uses what they know to address organizational challenges. Also, succession planning should be simple, individualized, and include experiential learning to prepare large pools of employees, not just a few individuals. Features of succession planning unique to the healthcare industry were offered. Examples
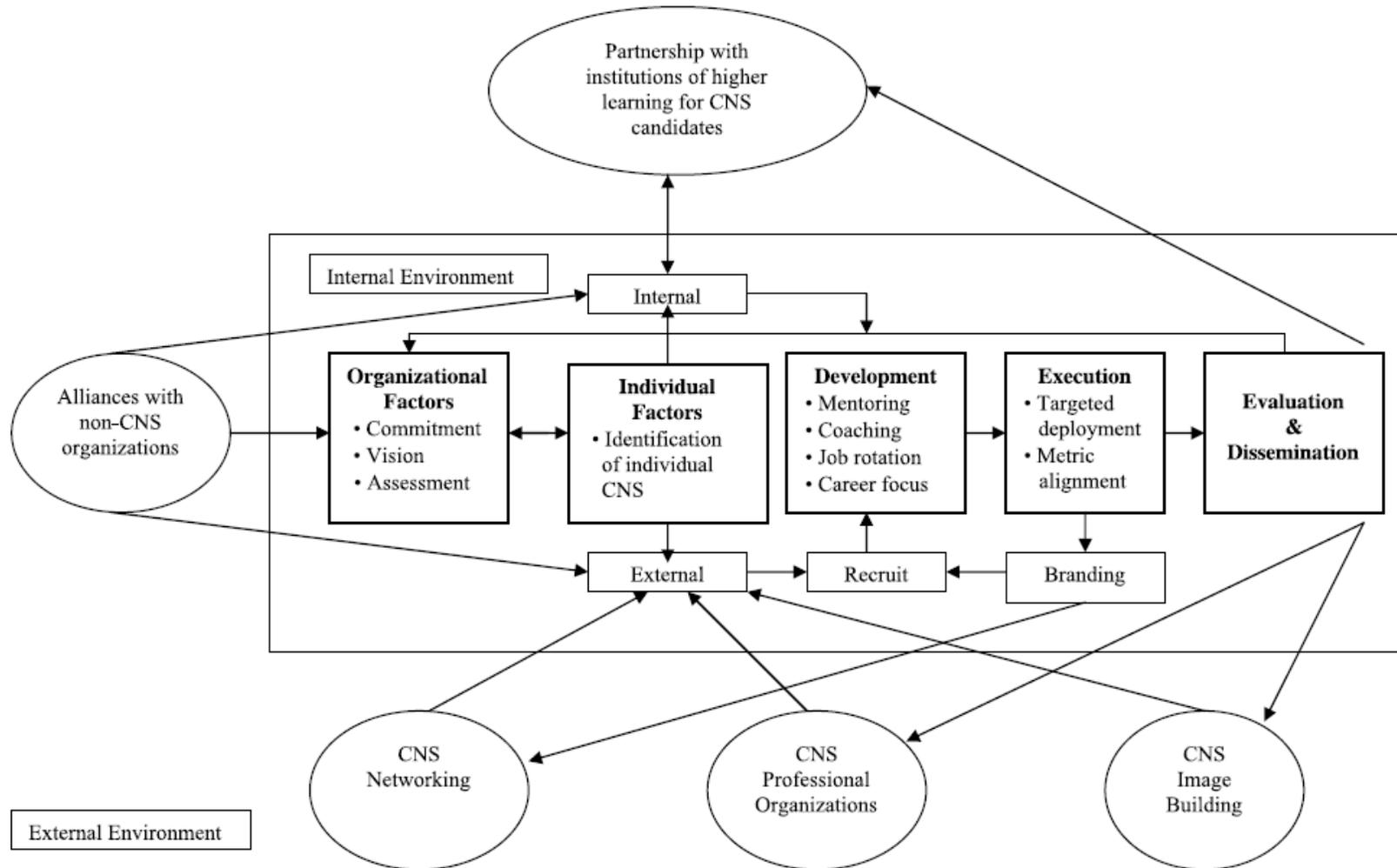
Figure 2.2. 5-step succession planning model for clinical nurse specialists (Shirey, 2008)

included the advantages of using succession plans deeper into the organization, lack of financial and leadership skills in new leaders, and assisting the new leader with making a connection between the business side and the patient-care side of the healthcare industry. Seven best practices for leadership development activities were discussed. The use of stretch assignments, self-assessment, reflection, mentoring/coaching, flexible talent identification process, current leaders creating future leaders, and didactic learning supplementing experiential learning were offered. Financial considerations of the succession process were identified. Benefits of using succession planning deeper in a healthcare organization include improved employee retention and job satisfaction, decreased new employee training, and the competitive advantage of a learning culture. Lastly, two examples of succession planning models found in this review of literature were provided.

The next chapter will detail the methods and procedures used to determine perceived effectiveness of current leadership development at Inova Loudoun Hospital. This will include a description of the population, instrument design, methods of data collection, statistical analysis, and a summary. The instrument used will be a survey.

CHAPTER III

METHODS AND PROCEDURES

This study entailed descriptive research that used a survey to address the research goals. This chapter describes the population studied, instrument design employed, and methods used for data collection. The techniques of statistical design are described and a summary of this chapter is provided.

POPULATION

The population of this study includes all leaders at Inova Loudoun Hospital. Inova Health System defines a leader as an employee who supervises people, or plays a major role in the growth, development, strategy, or operation of an operating unit. The sample consisted of forty employees, representing nursing, ancillary services, and support services. Although professional specialties of the leaders varied, each employee received the same leadership training and is held accountable to Inova's standards of practice. Every leader who attended the May 2009 Management Forum Meeting was surveyed.

INSTRUMENT DESIGN

The instrument used to gather data in this study was a pencil and paper-based survey, which was a five item questionnaire, designed to answer the research goals. The content of the questions were derived from research obtained in the review of literature, as guided by the research goals. The first question identified how long the employee has been in their current leadership position. The attitudinal measuring technique utilized on the next three questions was a Likert scale. The last question of the survey was an open-ended question, in which leaders were asked to list additional items that would have been beneficial in their own leadership development. The valuable information obtained was

later used in making recommendations for succession planning at Inova Loudoun Hospital. A sample of the survey can be found in Appendix A.

METHODS OF DATA COLLECTION

Members of the population who were in attendance of the May 2009 Management Forum meeting at Inova Loudoun Hospital were surveyed. An explanation of the survey was provided in a cover letter that was read aloud to the group of leaders. A sample of the cover letter may be found in Appendix B. Surveys were then distributed to all leaders in attendance and collected from respondents prior to exiting the meeting room.

STATISTICAL ANALYSIS

After receiving completed surveys, scores were organized in a spreadsheet for analysis. The collected data were reviewed and mean values were calculated for each forced choice response. The responses from the open-ended question were used in making recommendations for succession planning at Inova Loudoun Hospital.

SUMMARY

This chapter described the methods and procedures used in this study. The population was revealed as all leaders at Inova Loudoun Hospital, and the sample included those leaders in attendance of the monthly Management Forum Meeting held in May 2009. The instrument used was a five question survey that targeted the research goals of this study. Three questions of the survey used the Likert Scale to measure respondent's attitudes, and one question was open ended. The data obtained from the survey was helpful in revealing perceived gaps in leadership development at Inova Loudoun Hospital. The results of the study's research will be reported in the next chapter.

CHAPTER IV

FINDINGS

The purpose of this study was to evaluate the effectiveness of succession planning in healthcare organizations to determine how it should be implemented at Inova Loudoun Hospital in Lansdowne, Virginia. A survey was distributed to current leaders at Inova Loudoun Hospital to assess leadership development currently offered. This chapter will report findings of data collected. First, the number of surveys distributed and the number and percentage of completed surveys returned is provided. Next, data are presented from each question. Finally, written comments that were provided by survey respondents to an open-ended question on the survey are given.

SURVEY RESPONSE RATE

The survey was distributed at a Management Forum meeting attended by current leaders at Inova Loudoun Hospital. Sixty-eight leaders were given the survey and 40 completed surveys were received, producing a 58.8% completion rate for this study.

WHAT TYPES OF LEADERSHIP DEVELOPMENT HAVE BEEN PRACTICED WHEN IMPLEMENTING SUCCESSION PLANNING PROGRAMS?

Question 1 of the survey asked the respondent how long they had been in their current leadership position. Forty respondents answered this question; one respondent indicated less than 6 months; 11 indicated 6 months to 2 years; 16 indicated 2 to 5 years; eight indicated 5 to 10 years; and three indicated more than 10 years. The results are found in Figure 4.1.

Time in Leadership Position
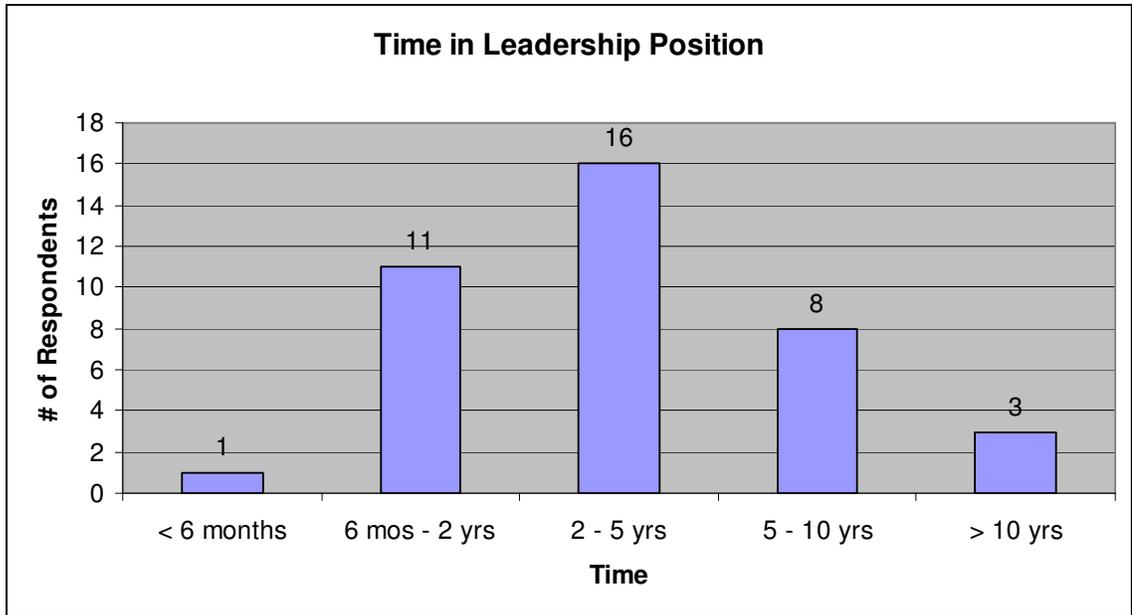
Figure 4.1. Time in Leadership Position

WHAT ARE THE FINANCIAL CONSIDERATIONS WHEN IMPLEMENTING A SUCCESSION PLANNING PROGRAM IN A HEALTHCARE ORGANIZATION?

Question 2 asked the respondent to indicate the length of time it took them to feel comfortable in their leadership position. Thirty-nine respondents answered this question. One person indicated that they have only been in their leadership role for six weeks and was not yet comfortable. Nine respondents answered that it took 0 to 6 months; 16 answered 6 to 12 months; six answered 12 to 18 months; five answered 18 to 24 months; three answered more than 24 months. The results are displayed in Figure 4.2.

WHAT CONSIDERATIONS EXIST WHEN IMPLEMENTING A SUCCESSION PLAN IN A HEALTHCARE ORGANIZATION?

Question 3 asked the respondent to rate the difficulty in overcoming certain obstacles as they began their leadership position. Respondents were asked to rate each of

Time until comfortable in Leadership Position
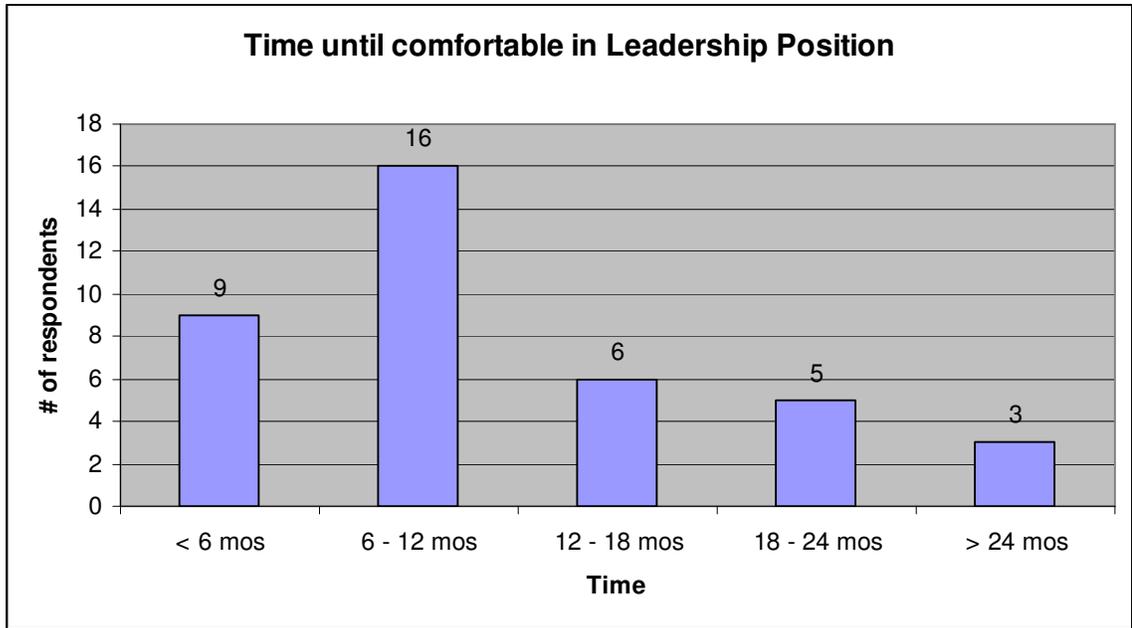
Figure 4.2. Time until comfortable in Leadership Position

the five obstacles provided. Below, each obstacle is listed with the corresponding Likert

scale results and calculated mean.

Two of the respondents did not circle a response for Learning Financial &

Budgeting, leaving 38 results. Thirteen percent of the respondents felt this obstacle was

very difficult to overcome; 35 percent difficult; 18 percent neutral; 18 percent somewhat

easy and 16 percent felt it was an easy obstacle. The mean score was 2.89, indicating the

average response to this obstacle was neutral. See Table 4.1.

Table 4.1. Learning Financial & Budgeting obstacle number of responses

	Very Difficult	Difficult	Neutral	Somewhat Easy	Easy	Mean
Learning Financial & Budgeting	1	2	3	4	5	
Number of responses	5	13	7	7	6	2.89
Percentage (%) of responses	13	34	18	18	16	

Thirty-nine respondents provided a response to Learning Human Resources/Labor Laws. Five percent experienced this as a very difficult obstacle, 31 percent difficult, 31 percent were neutral, 18 percent as somewhat easy, and 15 percent as easy. The mean score was 3.08, indicating the average response as neutral for this obstacle. See Table 4.2.

Table 4.2. Learning Human Resources/Labor Laws obstacle number of responses

	Very Difficult	Difficult	Neutral	Somewhat Easy	Easy	Mean
Learning Human Resources/Labor Laws	1	2	3	4	5	
Number of responses	2	12	12	7	6	3.08
Percentage (%) of responses	5	31	31	18	15	

Thirty-nine respondents provided a response to Motivating employees. Eight percent experienced this as a very difficult obstacle, 23 percent difficult, 13 percent were neutral, 26 percent as somewhat easy, and 31 percent as easy. The mean score was 3.49, indicating the average response as neutral for this obstacle. See Table 4.3.

Table 4.3. Motivating employees obstacle number of responses

	Very Difficult	Difficult	Neutral	Somewhat Easy	Easy	Mean
Motivating employees	1	2	3	4	5	
Number of responses	3	9	5	10	12	3.49
Percentage (%) of responses	8	23	13	26	31	

Thirty-nine respondents provided a response to Establishing trust with new peers. Three percent experienced this as a very difficult obstacle, 8 percent difficult, 21 percent were neutral, 44 percent as somewhat easy, and 26 percent as easy. The mean score was 3.82, indicating the average response as somewhat easy for this obstacle. See Table 4.4.

Table 4.4. Establishing trust with new peers obstacle number of responses

	Very Difficult	Difficult	Neutral	Somewhat Easy	Easy	Mean
Establishing trust with new peers	1	2	3	4	5	
Number of responses	**1**	**3**	**8**	**17**	**10**	**3.82**
Percentage (%) of responses	**3**	**8**	**21**	**44**	**26**	

Thirty-seven respondents provided a response to Transitioning from peer to boss, as two respondents wrote in n/a for their answer to this obstacle. Three percent experienced this as a very difficult obstacle, 14 percent difficult, 27 percent were neutral, 32 percent as somewhat easy, and 24 percent as easy. The mean score was 3.62, indicating the average response as somewhat easy for this obstacle. See Table 4.5.

Table 4.5. Transitioning from peer to boss obstacle number of responses

	Very Difficult	Difficult	Neutral	Somewhat Easy	Easy	Mean
Transitioning from peer to boss	1	2	3	4	5	
Number of responses	**1**	**5**	**10**	**12**	**9**	**3.62**
Percentage (%) of responses	**3**	**14**	**27**	**32**	**24**	

WHAT ARE BEST PRACTICES WHEN IMPLEMENTING A

SUCCESSION PLAN?

Question 4 asked the respondents to rate ten different experiences in terms of usefulness to their own leadership development. This question appeared on the back of the survey. Six surveys were turned in with Questions 4 and 5 left blank. A 5-point Likert scale was provided for the respondent to circle the appropriate response. Below, each

leadership development activity is listed with the corresponding Likert scale results and

calculated mean.

Thirty-one respondents provided an answer to the experience of ILI sessions.

Thirteen percent believed they were not useful, 23 percent were neutral, 52 percent

believed useful, and 13 percent very useful. The mean score was 3.65, indicating the

average response that ILI sessions were useful. See Table 4.6.

Table 4.6. Usefulness of ILI sessions to leadership development

	Did not experience	Waste of Time	Not Useful	Neutral	Useful	Very Useful	Mean
ILI sessions	n/a	1	2	3	4	5	
Number of responses	3	0	4	7	16	4	3.65
Percentage (%) of responses			13	23	52	13	

Twenty respondents provided an answer to the experience of Leadership

Immersion. Fifteen percent believed it was not useful, 45 percent were neutral, and 40

percent believed useful. The mean score was 3.25, indicating the average response as

neutral on the usefulness of Leadership Immersion. See Table 4.7.

Table 4.7. Usefulness of Leadership Immersion to leadership development

	Did not experience	Waste of Time	Not Useful	Neutral	Useful	Very Useful	Mean
leadership Immersion	n/a	1	2	3	4	5	
Number of responses	14	0	3	9	8	0	3.25
Percentage (%) of responses			15	45	40		

Twenty-eight respondents provided an answer to the experience of Coaching. Four percent believed it was not useful, 21 percent were neutral, 64 percent believed useful, and 11 percent believed very useful. The mean score was 3.82, indicating the average response that coaching was useful. See Table 4.8.

Table 4.8. Usefulness of coaching to leadership developmen**t**

	Did not experience	Waste of Time	Not Useful	Neutral	Useful	Very Useful	Mean
Coaching	n/a	1	2	3	4	5	
Number of responses	**6**	**0**	**1**	**6**	**18**	**3**	**3.82**
Percentage (%) of responses			**4**	**21**	**64**	**11**	

Twenty-nine respondents provided an answer to the experience of Higher education. Twenty-four percent were neutral about the usefulness, 35 percent believed useful, and 41 percent believed very useful. The mean score was 4.17, indicating the average response that higher education was useful. See Table 4.9.

Table 4.9. Usefulness of Higher education to leadership development

	Did not experience	Waste of Time	Not Useful	Neutral	Useful	Very Useful	Mean
Higher education	n/a	1	2	3	4	5	
Number of responses	**5**	**0**	**0**	**7**	**10**	**12**	**4.17**
Percentage (%) of responses				**24**	**35**	**41**	

Thirty-three respondents provided an answer to the usefulness of Real-life experiences. Three percent were neutral about the usefulness, 21 percent were neutral, 12 percent believed useful, and 85 percent believed very useful. The mean score was 4.82,

indicating the average response that real-life experiences were very useful. See Table

4.10.

Table 4.10. Usefulness of Real-life experiences to leadership development

	Did not experience	Waste of Time	Not Useful	Neutral	Useful	Very Useful	Mean
Real-life experiences	n/a	1	2	3	4	5	
Number of responses	**0**	**0**	**0**	**1**	**4**	**28**	**4.82**
Percentage (%) of responses				**3**	**12**	**85**	

Thirty-four respondents provided an answer to the experience of Self-initiated

learning. Six percent believed it was not useful, 21 percent were neutral, 41 percent

believed useful, and 32 percent believed very useful. The mean score was 4.24, indicating

the average response that self-initiated learning was useful. See Table 4.11.

Table 4.11. Usefulness of Self-initiated learning to leadership development

	Did not experience	Waste of Time	Not Useful	Neutral	Useful	Very Useful	Mean
Self-initiated learning	n/a	1	2	3	4	5	
Number of responses	**0**	**0**	**2**	**7**	**14**	**11**	**4.24**
Percentage (%) of responses			**6**	**21**	**41**	**32**	

Thirty-three respondents provided an answer to the experience of Talking with

leadership peers. Three percent were neutral about the usefulness, 39 percent believed

useful, and 58 percent believed very useful. The mean score was 4.55, indicating the

average response that talking with leadership peers was very useful. See Table 4.12.

Table 4.12. Usefulness of Talking with leadership peers to leadership development

	Did not experience	Waste of Time	Not Useful	Neutral	Useful	Very Useful	Mean
Talking with leadership peers	n/a	1	2	3	4	5	
Number of responses	**1**	**0**	**0**	**1**	**13**	**19**	**4.55**
Percentage (%) of responses				**3**	**39**	**58**	

Twenty-five respondents provided an answer to the experience of Stretch assignments. Thirty-six percent were neutral about the usefulness, 40 percent believed useful, and 24 percent believed very useful. The mean score was 3.88, indicating the average response that stretch assignments were useful. See Table 4.13.

Table 4.13. Usefulness of stretch assignments to leadership development

	Did not experience	Waste of Time	Not Useful	Neutral	Useful	Very Useful	Mean
Stretch assignment	n/a	1	2	3	4	5	
Number of responses	**8**	**0**	**0**	**9**	**10**	**6**	**3.88**
Percentage (%) of responses				**36**	**40**	**24**	

Thirty-two respondents provided an answer to the experience of Performance appraisals. Thirteen percent believed it was not useful, 28 percent were neutral, 44 percent believed useful, and 16 percent believed very useful. The mean score was 3.63, indicating the average response that performance appraisals are useful. See Table 4.14.

Table 4.14. Usefulness of Performance appraisals to leadership development

	Did not experience	Waste of Time	Not Useful	Neutral	Useful	Very Useful	Mean

Performance appraisals	n/a	1	2	3	4	5	
Number of responses	**2**	**0**	**4**	**9**	**14**	**5**	**3.63**
Percentage (%) of responses			**13**	**28**	**44**	**16**	

Twenty-eight respondents provided an answer to the experience of Mentoring.

Twenty-one percent were neutral about the usefulness, 46 percent believed useful, and 32

percent believed very useful. The mean score was 4.11, indicating the average response

that mentoring was useful. See Table 4.15.

Table 4.15. Usefulness of Mentoring to leadership development

	Did not experience	**Waste of Time**	**Not Useful**	**Neutral**	**Useful**	**Very Useful**	**Mean**
Mentoring	n/a	1	2	3	4	5	
Number of responses	**6**	**0**	**0**	**6**	**13**	**9**	**4.11**
Percentage (%) of responses				**21**	**46**	**32**	

WHAT PERCEIVED GAPS IN LEADERSHIP DEVELOPMENT EXIST AT

INOVA LOUDOUN HOSPITAL?

Question 5 of the survey asked the leaders to indicate any other tools that would

have been beneficial to their leadership development. The answers collected are as

follows:

- Opportunity to work with an executive coach for the 1st year in my position

- Studor tools to use with staff.

- Caliper was informative and insightful to small discoveries that I was unaware of.

- Becoming a manager of a department that is completely different then any other department in the whole hospital has been difficult. It has truly been an ask someone, who directs you to someone, that directs you to someone. A lot of time we hope it's right, and when we don't get any feedback, we guessed right.

- Having a senior person in my department from whom I could learn more.

SUMMARY

Surveys were given to 68 leaders in a healthcare organization. Forty completed surveys were returned, producing a 58.8% completions rate for this study. The survey contained questions that addressed succession planning. Questions were related to leadership development experienced by current leaders in a healthcare organization. The data collected were analyzed and presented in this chapter.

From the analyzed data, the average respondent was neutral about three of the obstacles experienced in their leadership role, and they felt that the other two obstacles presented in the survey were somewhat easy to overcome. The average respondent felt that real-life experiences and talking with leadership peers were very useful to their leadership development. ILI sessions, Coaching, Higher education, Self-initiated learning, stretch assignments, and Performance Appraisals were all felt to be useful experiences.

Chapter V will address the content of the first four chapters. This includes a discussion of the significance and limitations of this study, as well as the instrument used for data collection. Conclusions drawn from the survey data will be provided and recommendations made by the researcher concerning succession planning implementation at Inova Loudoun Hospital in Lansdowne, Virginia, will be given.

CHAPTER V

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

This chapter summarizes the content of previous chapters, provides conclusions based on survey data collected, and offers recommendations for leadership development and succession planning implementation at Inova Loudoun Hospital.

SUMMARY

The purpose of this study was to evaluate the effectiveness of succession planning in healthcare organizations to determine how it should be implemented at Inova Loudoun Hospital in Lansdowne, Virginia. To answer this problem, the following questions were established:

1. What are best practices when implementing a succession plan?

2. What considerations exist when implementing a succession plan in a healthcare organization?

3. What types of leadership development have been practiced when implementing succession planning programs?

4. What are the financial considerations when implementing a succession planning program in a healthcare organization?

5. What perceived gaps in leadership development exist at Inova Loudoun Hospital?

As "baby boomers" retire, depleting the workforce, organizations need a current strategy in place to survive, let alone stay ahead of their competitors. It is the responsibility of leaders to remain open and transparent to develop the leaders of tomorrow (Wagner, 2007). Human capital in health care organizations is an important asset and is often the reason a successful organization stands out (Coonan, 2005).

Succession planning offers a smooth transfer of knowledge and ensures that there are successors in place to fill key positions. Succession planning can be applied throughout the organization. Historically, healthcare employees with exemplary technical skills were promoted into leadership roles. However, technical skill does not equate to leadership ability. Without proper leadership development, many of these talented individuals do not succeed in their new role (Collins & Collins, 2007).

Recent research has shown that a majority of hospitals in the United States do not conduct succession planning (Garman & Tyler, 2007; Stephens, 2006). Inova Health System has placed an emphasis on leadership development, which resulted in the formation of the Inova Leadership Institute (ILI). Consistent with the principles that have been implemented and taught at Inova's ILI, succession planning would allow current leaders in the organization to develop effective leaders.

Differences exist such that there is not one succession planning system that meets the needs of every sector and every organization. If a hospital or healthcare system wants to implement a succession plan, it is important for the specific needs related to the health sector and the mission, vision, and values of the individual hospital or system to be considered. It is evident that today's resources are limited and competition exists for priorities, making it necessary for healthcare organizations to increase performance and productivity while maintaining a workforce of quality, safety, and excellence. At minimum, organizational factors affecting a succession plan and desired outcomes would be specific to each organization. The implementation of a succession plan requires an ongoing commitment.

This study was limited to employees in leadership positions at one non-profit healthcare organization in Loudoun County, Virginia. The population of this study includes all leaders at Inova Loudoun Hospital. This consisted of employees representing nursing, ancillary services, and support services. Although professional specialties of the leaders varied, each employee has received the same leadership training and is held accountable to Inova Health System's standards of practice. Every leader who attended the May 2009 Management Forum Meeting was surveyed.

The instrument used to gather data in this study was a pencil and paper-based survey, including five items, designed to answer the research goals. The content of the questions were derived from research obtained in the review of literature, as guided by the research goals. The first question identified how long the employee has been in their current leadership position. The attitudinal measuring technique utilized on the next three questions was a Likert Scale. The last question of the survey was an open-ended question, in which leaders were asked to list additional items that would have been beneficial in their own leadership development.

An explanation of the survey was provided in a cover letter that was read aloud to the group of leaders in attendance of the Management Forum meeting. Surveys were then distributed to all leaders in attendance and collected from respondents prior to exiting the meeting room. After receiving completed surveys, scores were organized in a spreadsheet for analysis. The collected data were reviewed and mean values were calculated for each forced choice response. The responses from the open-ended question were listed and were used in making recommendations for a succession planning model at Inova Loudoun Hospital.

CONCLUSIONS

The following conclusions were based on the research findings and will be addressed by answering each research goal

1. **What are best practices when implementing a succession plan?**

The leaders that participated in the survey were asked to rate the leadership development activities they had experienced in terms of its usefulness. The average respondent felt those real-life experiences (4.82) and talking with leadership peers (4.55) were very useful to their leadership development. This is consistent with the discussion of succession planning best practices offered in the review of literature, which emphasized the importance of experiential learning. Higher education and Self-initiated learning were felt to be useful and had an average mean between 4 and 4.5. The following activities were also felt to be useful experiences, but had an average mean between 3.5 and 4: ILI sessions, Coaching, Stretch assignments, and Performance Appraisals.

2. **What considerations exist when implementing a succession plan in a healthcare organization?**

The leaders surveyed in this research were asked to rate the difficulty of five obstacles encountered in their leadership position. From the analyzed data, the average respondent was neutral about Learning Financial & Budgeting (2.89), Learning Human Resources/Labor Laws (3.08), and Motivating employees (3.49). Respondents felt that Establishing trust with leadership peers (3.82) and Transitioning from peer to boss (3.62) were somewhat easy to overcome. The discussion of succession planning in healthcare organizations in the review of literature pointed out that new healthcare managers

typically have weaknesses in the areas of finance, as it is often not included in the education received for their clinical specialty.

3. **What types of leadership development have been practiced when implementing succession planning programs?**

Although Inova Loudoun Hospital has not formally implemented a succession planning program, there have been great efforts to provide leadership development. The literature review in this paper identified succession planning best practices, as well as leadership development best practices. These best practices were used when developing the content of the survey instrument.

4. **What are the financial considerations when implementing a succession planning program in a healthcare organization?**

The survey identified those practices that current leaders perceive as useful, as well as other tools currently not offered that are felt would be beneficial. When an organization is planning for a succession plan, financial considerations will involve determining what level of financial support and to what areas the organization, the Board, and executive leadership are willing to invest.

5. **What perceived gaps in leadership development exist at Inova Loudoun Hospital?**

Survey respondents were asked to identify other tools they felt would have been beneficial to them in their leadership development. Gaps revealed in this open-ended question included having opportunities to work with an executive coach in the first year as a leader, more tools to use with staff when implementing Studor principles adopted by Inova Health System, being aware of leaders who manage atypical departments and

providing them ongoing feedback, and having a senior person within the same

department to learn from.

RECOMMENDATIONS

Based on the findings and conclusions from this study, the following

recommendations are made by the researcher.

The most frequent response to the second question on the survey was that the

current leaders at Inova Loudoun Hospital were comfortable in their leadership position

after six to twelve months. The researcher recommends focusing on and supporting

leadership development in the first year for all new leaders in the organization. This

would also support the suggestions provided in the open-ended question on the survey -

having a senior leader to learn from and working with an executive coach in the first year

of a leadership position.

Producing other leaders should be a part of every leader's job. The first question

on the survey revealed an ideal distribution of all current leaders' length of experience.

Also, mentoring was shown to be useful to current leaders in their leadership

development. Consistent with the first recommendation made by the researcher, the bell

curve distribution of leadership experience that exists would benefit a mentoring program

targeted for leaders in their first year. A mentor is better able to find opportunities for

experiential learning, and allow those experiences to be individualized to the new

leader's talents and developmental needs.

The premise behind succession planning is not just obtaining knowledge, but how

that knowledge is used to address organizational challenges. If it is the strategy of the

organization to offer succession planning deeper into the organization, than it should be a

goal to give the developing leader a better view of the organization as a whole. For

example, a temporary stretch assignment, upwards or sideways, would give the

developing leader a different perspective in the organization. Also, such assignments

could demonstrate the balance of patient care with the business side of the industry.

Those employees identified with leadership potential could be encouraged to create an

individualized leadership development plan. This could be as simple as a section on their

performance appraisal where the employee identifies their goals specific to their own

leadership development.

As discussed, there is not one succession planning system that meets the needs of

every organization. If Inova Loudoun Hospital desires to implement a succession plan in

the future, clear goals and desired outcomes need to be specified by executive leadership.

Additionally, the level of support for a succession plan should be determined, as well as

how deep into the organization the planning will function. Lastly, the organization needs

to determine how it will identify employees with high potential.

The information obtained through this study should be used to improve leadership

development and support succession planning implementation. Such organizational

support is integral to employee engagement and builds a culture that provides a

competitive advantage.

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APPENDICES

APPENDIX A – COVER LETTER

Succession Planning Survey for Leaders at Inova Loudoun Hospital

My name is Stephanie Cross and I am a graduate student at Old Dominion University. I am conducting a study to determine the effectiveness of succession planning in healthcare organizations. This study is important to us and as a leader in this organization your knowledge can be useful in making improvements to current leadership development offered. I would greatly appreciate your participation in completing a short survey. Your names are not required and your participation is voluntary. All surveys will remain anonymous and the data collected will be kept strictly confidential. I understand that your time is valuable so the survey is brief and should only take a few minutes to complete. There are boxes located by the exits to the meeting room where you may place completed surveys. Feel free to ask any questions related to the questionnaire. Your time and participation are greatly appreciated.

Stephanie Cross   Dr. John M. Ritz
Graduate Candidate   Program Director
Old Dominion University   Dept. of Occupation & Technical Studies

Old Dominion University
Succession Planning in Healthcare Organizations

Purpose: The purpose of this study is to evaluate the effectiveness of succession planning in healthcare organizations to determine how it should be implemented at Inova Loudoun Hospital in Lansdowne, Virginia.

Directions: Please complete this survey regarding your own leadership development experiences at Inova Loudoun Hospital.

1. **How long have you been in your current leadership position? Please circle the appropriate response.**

< 6 mos.   6 mos.-2 yrs.   2 - 5 yrs.   5 - 10yrs.   >10 yrs.

2. **How long did it take until you felt comfortable in your current leadership position? Please circle the appropriate response.**

0-6 months   6-12 months   12-18 months   18–24 months   >24 months

3. **Rate the difficulty in overcoming the following obstacles as you began your leadership position. Please circle the appropriate response.**

	Very Difficult	Difficult	Neutral	Somewhat Easy	Easy
Learning Financial & Budgeting	1	2	3	4	5
Learning Human Resources/Labor Laws	1	2	3	4	5
Motivating employees	1	2	3	4	5
Establishing trust with new peers	1	2	3	4	5
Transitioning from peer to boss	1	2	3	4	5

4. **Rate the following experiences in terms of their usefulness to you in your own leadership development. Please circle the appropriate response.**

	Did not experience	Waste of Time	Not Useful	Neutral	Useful	Very Useful
ILI sessions	n/a	1	2	3	4	5
Leadership Immersion	n/a	1	2	3	4	5
Coaching	n/a	1	2	3	4	5
Higher education	n/a	1	2	3	4	5
Real-life experiences	n/a	1	2	3	4	5
Self-initiated learning (e.g. reading books)	n/a	1	2	3	4	5
Talking with leadership peers	n/a	1	2	3	4	5
Stretch assignments	n/a	1	2	3	4	5
Performance appraisals	n/a	1	2	3	4	5
Mentoring	n/a	1	2	3	4	5

5. **Please list any other tools you feel would have benefitted you in your leadership development.**