



Hospice Leader Succession Planning Tool Kit



NHPCO

National Hospice and Palliative
Care Organization



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Purpose

With the rapidly evolving environment of hospice and palliative care, it may be beneficial to recognize the opportunity to grow the future leaders from within an agency. Succession planning is the process of identifying existing staff and fostering their skill sets to replace leadership positions as they open for opportunity. A combination of succession planning and fostering high performing staff is key to retention and organizational sustainability.

The purpose of this toolkit is to furnish hospice leaders with the framework to begin and support their own succession planning. This kit is intended to be used in its entirety but can be honed specifically to the individual needs of each leader.

Succession planning can take on different forms and be completed for various situations. Three scenarios are recommended for all organizations:

- **Emergency Succession Planning** – A process that is in place in the event the executive suddenly departs, either permanently or for an extended period of time (longer than three months).
- **Departure-Defined Succession Planning** – A process that is in place for a future planned retirement or other permanent departure of the executive.
- **Strategic Leader Development** – A process that promotes ongoing leadership development for talent within the organization.

For succession planning to be effective, the leaders of an organization must first practice self-reflection on their own value and the scope of their day-to-day work within their agency.

Further upstream from this toolkit, effective talent identification should be embraced as a systemic organizational culture. Along with the individual needs for specific roles to undergo succession planning, it is equally important for organizations to embrace the following:

- Systems to adequately identify high turnover positions or positions at risk for turnover.
- Leadership positions with well-defined competencies.
- Opportunities for staff members at all levels to engage in leadership training and development.
- Systems that objectively identify talent and interest in existing staff.

Long-term Leadership Succession Planning

The purpose of this tool is to serve as a thought guide and give you a process for succession planning in a hospice or palliative care organization. The framework is intended to be global in application so that it can be used to promote from within the organization for any position ranging from frontline clinicians to executive leadership roles.

The future of the hospice and palliative care field is dependent on intentional leadership development and the ongoing commitment to the growth of professionals within the field.

Self-reflection and Assessment

● Personal Goals/Needs

- How did I get here? What did I do or strategize to be in my current role?
 - ▶ What was my pathway?
- What are my future goals?
 - ▶ Retirement, career advancement, role change, geographical change?
 - ▶ Why are these my goals?
 - ▶ How do I achieve them?
 - ▶ What is my timeline?

● Organizational Goals/Needs

- In the next six months
- In the next year
- In the next five years

Understanding your Resources

● Personal

- Who are my mentors and how can they help me with succession planning?
- In my own advancement, was any formal tool utilized by my mentor?

● Organizational

- What formal resources exist for succession planning?
 - ▶ Internal
 - ▶ External

Communication

- Is your supervising body (person or board of directors) aware of your desire to create a succession plan?
- Are potential candidates aware of your desire to create a succession plan?

Company Vision

- What are the goals of your agency/company over the next five years and how do they influence your successor identification?
 - Short term and long term goals
 - Barriers to achieving these goals

Evaluation

- **Identification of internal successor candidates**
 - What is needed?
 - ▶ Education?
 - ▶ Certifications?
 - ▶ License?
 - Who:
 - ▶ has voiced desire?
 - ▶ is coachable?
 - ▶ has demonstrated a high level of emotional intelligence?
 - ▶ has demonstrated independent problem solving and innovation?
 - ▶ has the qualities that the organization and you value?

Skills Needed/Skills to Develop

- **Education/certification/licensure requirements**
- **Technical skills needed/required: e.g. project management, policy, HR, technology, quality**
- **Personality/work pace/environment alignment**
- **Manager or leadership skill development**
- **Who does this role report to? Do their personality, communication styles, etc. align?**

Sharing Knowledge

- **Once internal candidates have been identified, plan to further develop skills**
 - Specify to target role
 - Develop timeline
 - Develop action plan
 - Offer resources
 - ▶ Professional training (e.g. NHPCO Manager Development Program)
 - ▶ Internal leadership training or formal mentorship programming offered by your organization
 - ▶ Personality or behavioral style questionnaires (e.g. DISC styles)

Succession Planning Tools

A variety of resources and tools are available online to help with long-term planning. We encourage you to explore these essential organizational tools for maintaining success in your succession planning. Different formats and styles may be a better fit for different positions and organizations. Here is one resource fellow NHPCO members have found useful.

- [Succession planning templates](#)

Guidance Provided

What regulatory, legal, or policy guidance do you routinely provide to staff? For example, are you responsible for reviewing travel contracts or training new hires on HIPAA Privacy policies? Consider whether this guidance will be provided by your successor and what training will be required to help them gain the knowledge required. Consider any leadership training or orientation offered by your organization. What is included in that training curriculum? What requires supplementing?

Goals

What are the goals that have been established for your position or your department that will need to be addressed by your successor? What goals have already been met?

Committees and Workgroups

What committees or workgroups do you participate in, both within and outside of your agency? Consider whether your successor or another representative of your agency will take your place in any of these groups.

Useful Resources

What resources do you reference routinely that would be important for someone in your position to access?

Accounts and Logins

What accounts or logins are in your name that should be transferred to your replacement or a colleague?

In the Meantime: Suggestions for High Performers

The following are opportunities to present to colleagues when you have a top performer but no open positions for promotion, or someone who shows great potential for leadership development. These opportunities are also useful for staff development and retention.

- Meet with and discuss with colleague what areas of the business interest them.
- Increase one-on-one time with the colleague to develop their skills and provide timely feedback.
- Look for lateral move opportunities based on stated interests.
- Apply for a position or committee with local hospice alliance/association.
- Attend seminars/trade shows offered locally.
- Explore educational opportunities online through universities or NHPCO.
- Encourage them to start and manage an office subcommittee such as "employee engagement committee" or "employee council."
- Mentor new team members in other offices within the company that may be new to their position.
- Attain advanced hospice certifications.
- Apply for an NHPCO committee/council position and engage with MyNHPCO e-communities.
- Attend a national conference, or apply to speak at a national conference.
- Identify manager in Training programs – be a mentor or find a mentor.
- Connect them to peers, encourage them to start a peer group within the company for colleagues in their role to develop best practices, talk through challenges, etc.
- Enroll them in leadership development courses (both internal and external offerings).
- Be the office representative for a local Chamber of Commerce or Rotary group.
- Hire a professional development coach.

References

NHPCO Manager Development Program. <https://www.nhpc.org/mdp/>

University of Washington. (2016). Succession Planning Toolkit. <https://hr.uw.edu/pod/wp-content/uploads/sites/10/2018/08/Succession-Planning-Toolkit.pdf>



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