

Succession Planning Template

A comprehensive leadership development and succession plan¹ is needed to meet the demand for perioperative leadership. A sense of urgency and strategic planning to develop new perioperative leaders is essential to maintaining optimal surgical operations.

We have reached the moment where the mean age of perioperative nurses is between 50 and 60 years. Succession planning is now an imperative. Baby Boomers in leadership roles must commit to leaving a legacy of wisdom upon which future health care can be based.²

Succession Planning Defined

A strategic process involving identification, development and evaluation of intellectual capital, ensuring leadership continuity within an organization³

Succession Planning Framework

The succession planning framework plan detailed by Titzer et al³ is based on Benner's novice-to-expert model and stages of professional development including

- novice;
- advanced beginner;
- competent;
- proficient; and
- expert.³

Succession Planning Success

The success of a leadership development plan is dependent upon support of all stakeholders in the organization. A cost-benefit analysis of the plan as well as formulation of a business case with return on investment (ROI) should be developed and endorsed by senior leaders within the organization. The cost must be incorporated into the budget for long term support.

Mentorship is a key component of leadership development and succession planning. Leaders should model the role and encourage proteges to fulfill their potential. There is a need to address work-life balance, which is a significant factor for millennials in our workforce.

It is recommended that succession planning that includes a mentor program become a valued priority across the organization or health system.¹ A systematic approach to tracking the plan and reviewing periodically is key. In some organizations, succession planning to ensure stable leadership is included in goals assigned to leaders and executives.

Succession Planning Prioritization Template

One organization* utilizes a template to track “high risk” and “high potential” leaders at various levels to maintain a stable and high performing leadership team. The template (Figure) is reviewed regularly by the department head and shared with senior leaders in the organization during one to one planning sessions.

High potential personnel include leaders with potential for internal development and promotion to the next level of leadership. The template indicates the timeline for readiness. The organization uses this tool to strategize leadership development classes and training opportunities to assure they are prepared to transition to the next level.

High risk personnel include those current leaders who are under performing, planning to leave the organization, or nearing retirement. Also included in the high-risk category is the manager or director to whom the primary high-risk individual reports to in our structure. In other words, if Nurse A identified as high risk, and Nurse B is Nurse A’s leader, then Nurse B is also high risk in this model.

The timeline covers the immediate up to 60 months and is reviewed semiannually and included in the review of lead goals assessment for planning.

Figure: Succession Planning Prioritization Template

Succession Planning Prioritization

Document Date:

Enter in appropriate box

- Name of Leader & Their Leader
- Areas of Responsibility
- Date
- Mission Critical

Example

● Nancy Smith (Charlotte Rocchio)
Main Operating Room Director
11/7/2017
Mission Critical - yes

Color Code** Key

- Ready now/12 months
- 24 months
- 36 months
- 60 months +

High Risk	●	●	●	●
High Potential	●	●	●	●

**Color code both High Risk Leaders & High Potential Leaders
 Note: T/External or T/Internal = no longer employed and filled with external or internal candidate or recruitment in process

*Template provided by Memorial Care Health System, CA

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High Risk

●	●	●	●
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High Potential

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Template provided by Memorial Health Care Systems, CA

Notes: _____



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