

SUCCESSION PLANNING FOR NURSING LEADERSHIP

The need

Today's nurses need to plan well in advance for the next stage of leadership in the profession. This is especially important now as the majority of nurses move into their retirement years over the next decade. Professional nursing organizations have never had a harder time filling key leadership positions in both volunteer (e.g., board of directors, committees) and staff positions (e.g., executive director, managers).

Nurses who are potential leaders don't necessarily have the range of experience and skills necessary today, not because they are uninterested or unwilling but because they have lacked the opportunities to develop themselves for leadership positions. Other contributing factors include heavy workload issues (at all levels, within all agencies/nursing roles) and personal career paths/goals and workplaces that do not necessarily value or reward voluntary work and leadership within professional nursing organizations.

Nursing leadership is required in provincial, territorial and national nursing associations, specialty nursing organizations and local chapters.

Defining leadership

Leadership can be viewed as a process that occurs within the minds of individuals who live in a culture and are in relationships with others. No leader is ever realized; at most, one can observe individuals who are in the course of attaining greater skills and heightened effectiveness. Four factors that appear crucial to the practice of effective leadership are:

1. A tie to the community – the relationship between the leader and the others is typically ongoing, active and dynamic;
2. A certain rhythm of life – a leader must be in regular and constant contact with the community but also know her own mind and has the time and means for reflection;
3. An evident relation between stories and embodiments – a leader exercises influence through the stories or messages that they communicate and through the traits that they embody; and
4. The centrality of choice – leaders attain the position in a situation where they and others exerted some kind of choice and where a measure of stability exists (Gardner, 1995).

Defining succession planning

Succession planning is a process that moves beyond “one-off” replacement planning into a process of identifying and nurturing a pool of potential candidates for leadership positions. Effective succession planning should be integral to the organization's culture, and the process should cultivate “predictability” rather than “chaos” or last minute scrambling to find potential leadership candidates. Succession planning considers moving through different levels of leadership, e.g., local chapters to provincial/territorial to national organizations.

Succession planning aims to:

- Attract high potential people (rising stars) to develop as leaders;
- Enhance other's leadership skills through formal and informal methods;
- Improve all aspects of others' potential; and
- Institutionalize leadership development in your association or organization.

Some ideas

1. Establish a committee or task force to determine how your association or organization will address succession planning for local, provincial/territorial and national leadership.
 - a. Who should be responsible for contributing to succession planning, including identifying roles and responsibilities?
 - b. How should succession planning be established on an ongoing, continuous basis in the organization, including the various levels of involvement?
 - c. Where do the lines of accountability exist?
 - d. What steps need to be taken for successful succession planning?
2. Take a long range and broad view of succession planning that spans a number of years and offers a variety of opportunities for the development of leadership competencies.
3. Use informal and formal methods in leadership development (Gardner, 1995):
 - a. Informal methods – Coaching by a leader
 - i. Discuss with people what they need to do to improve in specific areas – share experiences.
 - ii. Show people how to improve – model the behaviour.
 - iii. Clarify the consequences of behaviour – both positive and negative.
 - iv. Provide the big picture – how specific behaviours affect the global situation.
 - v. Use confidence building – statements of encouragement.
 - b. Formal methods
 - i. Identify the training needed – knowledge, skills, attitudes and competencies.
 - ii. Review the content and process of training programs designed to meet the need – formal courses or individual learning plan.
 - iii. Consider how the training can be customized for specific people and their needs and for the organizational or association culture.
 - iv. Have a follow-up process that can be used to reinforce the training.
 - v. Conduct pre-course and post-course discussion with the “rising stars.”
4. Consider using a framework, such as Byham's (2002) Acceleration Pools or Cohen and Jackson's (1998) Six Steps to Successful Succession Planning to develop your association's or organization's approach to succession planning (see Appendix A).

REFERENCES

- Byham, W. C. (2002). A new look at succession management. *Ivey Business Journal*, 66(5), 10-12.
- Cohen, D. & Jackson, K. (1998). The secrets to effective succession planning. *CMA Management Accounting*, 72(6), 19-20.
- Gardner, H. (1995). *Leading minds – An anatomy of leadership*. New York: Basic Books.

Appendix A

The Acceleration Pool system develops candidates for leadership positions, rather than targeting one or two hand-picked people for each leadership position. Pool members are offered “opportunities” that offer learning, visibility and accelerate individual development. Candidates have an assigned mentor, receive feedback, coaching and training and participate in special developmental. Opportunities that might be offered include:

- a. Attend association strategic planning process;
- b. Attend board or committee development sessions;
- c. Co-chair a committee, task force or work group;
- d. Chair conference sessions; and
- e. Participate in focus groups, expert and/or stakeholder groups.

Candidates for the Acceleration Pool may come from any context of nursing – students (undergraduate and graduate), clinical practitioners, educators, managers, researchers, etc.

Acceleration pools attempt to provide two things: an accurate assessment of development needs and an environment that facilitates individuals to acquire the desirable leadership qualities.

- a. Leadership descriptors are identified - what leaders need to know and must be able to do.
e.g.,
 - i. Organizational knowledge
 - ii. Job/position challenges
 - iii. Competencies
 - iv. Leadership derailers (i.e., special challenges)
- b. A Leadership Resource Group (volunteer and staff leaders) is responsible for placing pool members into situations where they can experience challenges, obtain organizational knowledge, develop competencies and overcome “derailers.”
- c. Pool members, the Leadership Resource Group and mentors meet to pin down the specifics of how to develop the competencies, job challenges and organizational knowledge required.
- d. Pool members are chosen to stand for director nomination, act as committee chairs, facilitate groups etc.

Adapted from “A new look at succession management,” by W. C. Byham, 2002, *Ivey Business Journal*, 66(5), p. 10-12.

Six steps to successful succession planning

For a board of directors and executive to be in a position to achieve a smooth transition once a gap in senior leadership occurs, six essential steps of succession planning can be implemented.

1. Define your values. An effective succession planning process begins with understanding the values and vision that drive the professional nursing organization. As part of the values, associated behaviours that are the essence of the culture and required for success need to be stated.
2. Provide for a fair and realistic assessment. Using the values and the corresponding behavioural definitions, it should be possible to measure and assess people's fit for successful leadership. A healthy organization exists when individuals are treated consistently by all leaders (volunteers and staff) in the organization.

3. Build the talent pool. Determine who has the capability to consistently demonstrate the required leadership behaviours and create development plans for experiences so they have a possibility of demonstrating behaviour and/or producing outcomes they have not done thus far. The development activities should be real on-the-job opportunities and focus on the future to grow individuals that consistently demonstrate the values and behaviours for nursing leadership.
4. Share people and the accountability for their development and promotion. The people doing the assessing have to develop a process for sharing information. They will need to state why they have identified certain people for the talent pool. In doing this, the fit of the talent pool with the leadership requirements at different levels, e.g., local, provincial, national, etc., can be continuously checked and re-checked for appropriateness.
5. Provide opportunities for development and promotion to leadership positions. The individual in the talent pool should be provided an opportunity to state if he or she wants to be considered for promotion. Current nurse leaders need to provide feedback and coaching to those in the talent pool, along with the time and resources to help them develop in areas not often directly associated with their current position.
6. Make selections from the talent pool.

Adapted from “The secrets to effective succession planning,” by D. Cohen & K. Jackson, 1998, *CMA Management Accounting*, 72(6), p. 19-20.

Approved by the CNA Board of Directors, 1 March 2003
(Recommended by the CNA Committee on Nominations to the CNA Board of Directors in February 2003, with thanks to Committee on Nominations member, Heather F. Clarke, RN, PhD for initial draft.)