

# Succession Planning for your Clinical Staff

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## Today's Agenda

- What is succession planning?
- People Management Life Cycle
- Succession Planning for Providers
- Branding Strategy
- Recruit for Tomorrow
- Website Strategies
- Data Management
- Generational Management
- On-boarding
- Orientation
- Retention
- Team Involvement
- Traditional Succession Planning
- Medical Staff Development Plan
- Physician/Provider Supply & Demand Assessment
- Commitment

## What is succession planning?

- Succession planning is a process whereby organizations ensure that employees are recruited and/or developed to fill each key role within the organization. The objective of succession planning is to ensure that the organization continues to operate effectively when individuals occupying critical positions depart.
- Succession planning is a process by which successors are identified for key positions throughout an organization.

## Succession Planning is Critical

- Succession planning is not a "nice to have". It is a necessary part of any organization's ability to reduce risk, create a proven leadership model, preserve organizational memories, smooth business continuity and improve staff morale.
- Development of a succession plan is not difficult but does require executive leadership and commitment from both the executive team and the staff.

## People Management Life Cycle

- Attract/Select
- Deploy/Redeploy
- Develop/Retain
- Perform/Reward
- Transition

## Succession Planning for Providers

When it comes to succession planning for providers, the issue is complicated by the fact that we cannot "train" a non-clinical/non-licensed employee to step into a vacated role. Provider recruitment and retention play a critical role in the succession plan for any community health center.

## Create a Long Term Strategy

- Primary care shortage is a reality.
- Having an effective succession planning strategy in place is essential.
- Prepare yourself for the long term.
- Establish long term and continuous performance management and succession planning efforts.
- Address generational differences.
- Prepare for the jobs of tomorrow.

## Branding Strategy

- Make your brand identifiable, distinctive and meaningful.
- Strengthen your existing brand or create a new one.
- First assess your market/competition.
- Define your practice's mission and purpose.
- Determine what makes your practice distinct from your competition.

## Recruit for Tomorrow

- Website Strategies
  - Dedicated physician/provider recruitment portal.
  - focus on differentiating your practice.
  - streamline candidate communications.
  - increase recruitment referrals.
- Social Media
  - LinkedIn, FaceBook, Twitter, and YouTube help communicate and build relationships more effectively with potential recruits.
  - Create greater brand visibility and drive traffic to your website with a strong online presence.
- Search Engine Optimization (SEO)
  - keyword research, content, design, and technical development to can increase the likelihood of ranking highly on the most commonly used search engines.
  - This can increase the presence and visibility of your website.
- E-mail marketing
  - Faster and low cost method of recruitment marketing.
  - Target BLT'ers and residents/students of your staff's alumni programs.

## Data Management

- Recruit for the future.
- Keep track of all leads.
- Update data as it comes in; utilize your applicant tracking system.
- Follow up on leads promptly.
- Track medical students, residents, PA and NP students who rotate through your system.

## Generational Management

- Five generations of physicians /providers working today.
- Five generations of patients looking for a provider with whom they feel comfortable.
- Different thought process.
- Differing attitudes toward technology.
- Different modes of preferred communication.
- Different attitudes towards work.
- Can cause conflict, turnover and dissatisfaction if not balanced appropriately.

## Identify and Grow Tomorrow's Leaders

- By using an acceleration pool, your CHC can increase the number of employees who will be prepared to step into leadership roles.
- It is important to include only those who have real potential for leadership positions.
- It is equally important to develop a process that ensures that every employee with leadership potential is fairly and thoroughly considered for participation.
- Ensure that the selection process results in a diverse group of employees to include in the acceleration pool.
- Be on the lookout for leadership potential, the identification process may begin during a candidate's the initial interview!

## Physician/Provider On-boarding

- Is a multi-faceted process that begins during recruitment.
- When done well, it gets the new physician/provider off to a strong start in the practice and community.
- When done well it aids significantly in **physician/provider alignment and retention**.
- One aspect of physician on-boarding often overlooked is a thoughtful and well-orchestrated orientation, **not just to the clinic, but to the hospital and community as well.** The clinics that get it right understand the power of first impressions and helping physicians /providers feel welcomed and connected to the organization

## Succession Planning

- **Impacts your ability to:**
  - Retain good people.
  - Have motivated and satisfied employees.
  - Have employees focused on the right things.
  - Attract talent.
  - *Which impacts your ability to achieve your mission.*

## Team Involvement

- A succession plan, or lack of one, affects the entire team.
- Staff departures, with no replacement in sight, puts extra burden on the staff that is left behind.
- Staff morale tends to be low while we conduct a lengthy search for a replacement.
- Word of mouth is our best recruitment tool; invite your staff to participate in the recruitment and selection process.

## Does everyone on your Medical Staff understand their role in the Physician/Provider Recruitment process

- Cheerleaders for Physician Recruitment.
- Provide a complete practice profile to your Physician Recruiter, even when you do not have an opening, so she can discuss potential openings with potential candidates (remember, she meets them at conferences, job fairs, phone calls, etc).
- Integrate your Physician Recruiter into your department, so she is a true "partner" and representative of both your Group and Department .
- Keep in touch with their training programs, for future prospects for the health system.
- When your Physician Recruiter asks for your involvement to call a candidate, attend a dinner, lunch, meet a candidate in the hall; JUST DO IT! Even if the candidate is not for your department b/c next time, they just might be!
- Be an Ambassador for the group!
- Offer to sponsor a medical student, resident or fellowship rotation in your practice.

## Retiring Docs/Providers are an invaluable part of your recruitment team...

- Get them engaged in the recruitment process early.
- Use their wisdom and experience.
- Are they involved in your current process?
  - If not, begin to get them involved.
  - Training-interview techniques, recruitment processes.
  - Mentoring-are they involved in your physician mentoring program?

## Traditional Succession Planning Worksheet

- **Position Title**
- **Incumbent Name**
- **Retirement Status:**
  - A: Retirement likely within 1 year
  - B: Retirement likely within 3 years
  - C: Retirement eligible within 5 years
- **Criticality**
  - 1: Critical - Must "hit the ground running"
  - 2: Very Important - Fully functional within 6 months
- **Number of Staff Ready Now**
- **Number of Staff Ready in 1-2 Years**
- **Succession Planning Priorities**

## Medical Staff Development Plan

- The Medical Staff Development Plan is an essential physician/provider recruitment planning tool. An updated plan identifies the current and future level of physician recruitment needed to maintain the support the medical needs of our community.

## Develop an Annual Medical Staff Development Plan

- Identify Committee Members
- Develop on-going list of provider's to track
  - Who to retain
  - Who is due for retirement
  - Contract renewals
  - Spouse/family commitment that could mean moves (i.e. military, residency, fellowship, graduate school)
  - Unhappy Providers
  - Provider reducing hours
  - Any upcoming maternity leaves
  - Any other leave of absence

## Which positions fall under the MSDP

- MD/DO
- Nurse Practitioners
- Physician Assistants
- Certified Nurse Midwives
- Dentists
- Other medical staff?

## Patient Population

- Panel size
- Population growth
- Male
- Female
- Age
- Impact on department by specialty
- Appointment availability

## Physician Supply & Demand Assessment

- Physician/provider need is quantified.
- Identify the number of physicians needed by specialty, for service area and practice locations.
- Use physician-to-population ratios based on national demand models and regional practice patterns, incorporating demographic trends, local productivity adjustments, and market share trending data.

## Physician Turnover & Retention

- Physician Turnover and retention are among the most critical issues that clinics must address.
- The changing demographics of the physician workforce has a major impact on turnover and retention of medical staff.
- As the baby boomer physicians retire, and number of graduating physicians declines, physician turnover and retention must be at the top of your list of priorities.

## On-going Recruitment is Key

- Know your stuff-this is your industry, stay up to date on current trends in your market and the national market;]
- Educate your executive team and medical staff on the current physician/provider recruitment environment.
- Keep the pipeline active.
- Maintain an active "data base".
- Maintain and foster training program relationships.
- Keep your staff up to date in regards to Physician/Provider Recruitment training, interview skills, etc.
- Re-evaluate your orientation, mentor & retention programs.
- Keep your "finger on the pulse" and your "eyes and ears" open to the emotions and "going's on" amongst your medical staff.
- Be realistic and help your health system do the same.
- Maintain an official/unofficial liaison role with your medical staff.
- And, never, ever...let them put the brakes on! Physician Recruitment is an on-going process and *key to your succession plan*.

## Planning, Commitment & Follow Through

Succession planning is strategic, both in the investment of resources devoted to it and in the kinds of talent it focuses on. It is not a one time event; rather, it is re-assessed and revised annually through the workforce planning process.

**"If you don't know where  
you are going you might end  
up somewhere else."**

*Yogi Berra*