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PRESENTERS



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OVERVIEW

- Review trends in healthcare
- Review the Rothwell Model
- Discuss what should be evaluated
- Explore how to evaluate SP programs
- Discuss current practices
- Wrap up webcast series

REVIEW

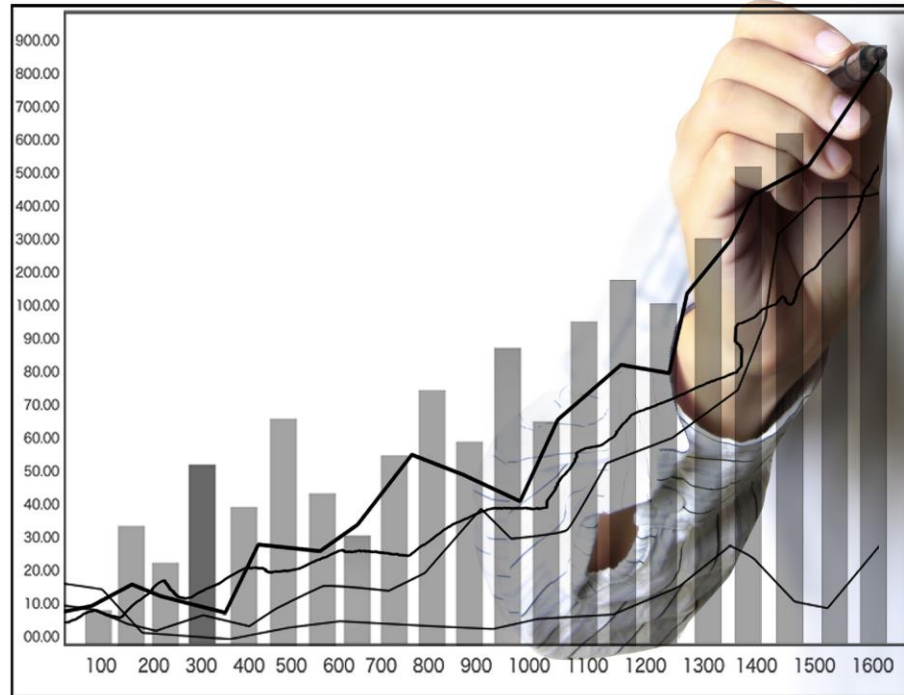
TRENDS/CHALLENGES



ACCELERATED CHANGE

Transforming the workplace

Changes and disruptions in the workforce is forcing TM professionals to examine new practices



THE GREYING

- By 2019, workers 55 and older will become 25 percent of the workforce (Sloan Center on Aging & Work)
- In healthcare, by 2020 it is estimated nearly half of all registered nurses will reach traditional retirement age



THE NEW NAVIGATORS

- By 2025, millennials will account for 75% of the global workforce
- 28% of millennials feel that high pay is important
- 74% prefer to collaborate in small groups.



THE GAP

Occupational Title	Employment 2014	Projected Employment 2024	Shortage
Home Health Aides	913,500	1,261,900	348,400
Nursing Asst. and Orderlies	1,545,200	1,813,000	267,800
Registered Nurse	2,751,000	3,190,300	439,300
Nurse Practitioners	126,900	171,700	44,800
Physician Assistants	94,400	123,200	28,800
Physicians and Surgeons	708,300	807,600	99,300
Medical Assistants	591,300	730,200	138,900

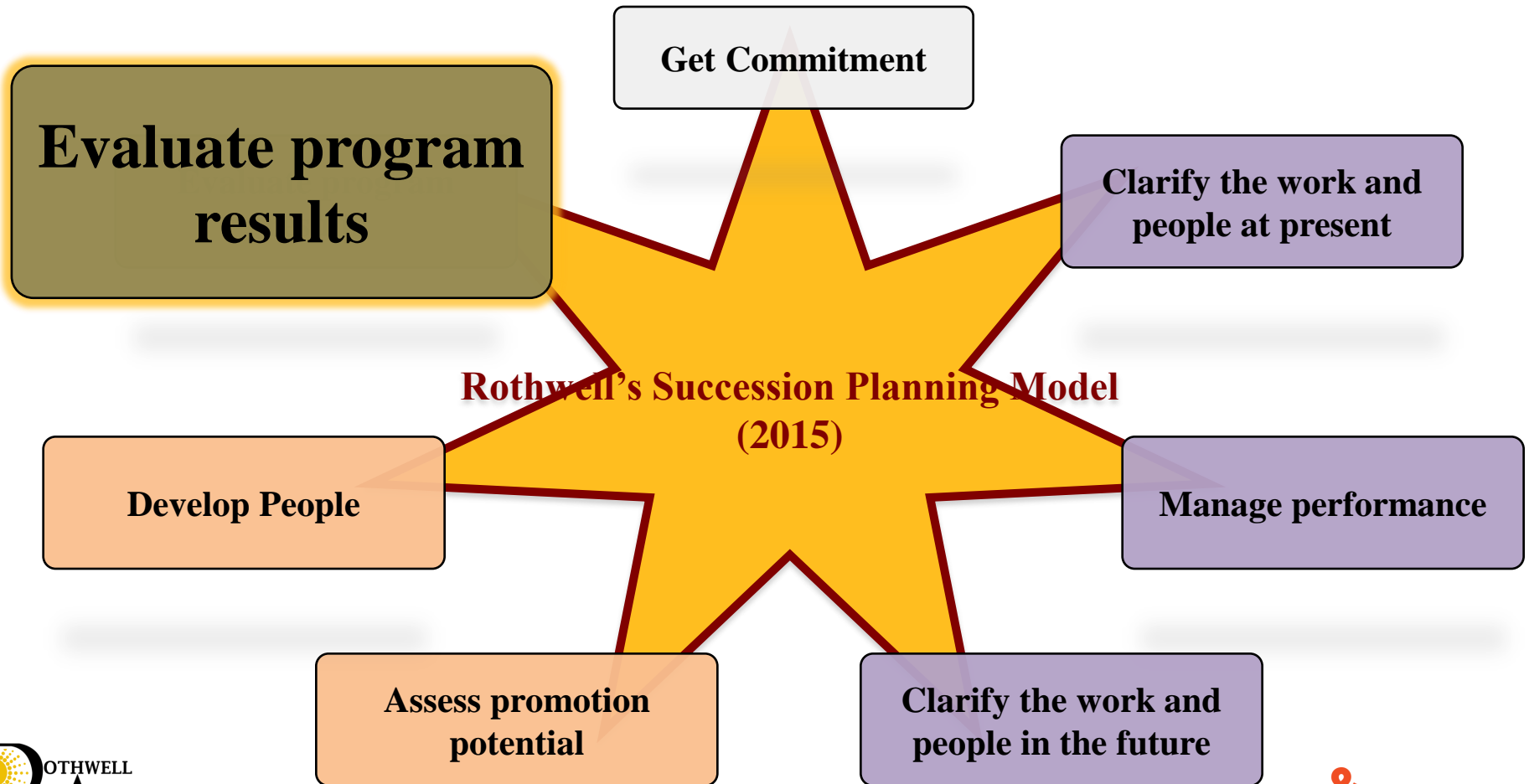


Source: U.S. Bureau of Labor Statistics, Employment Projections program



REVIEW

ROTHWELL'S SUCCESSION PLANNING





AUDIENCE PARTICIPATION

Poll:

What metrics do you think should be used to evaluate a Succession Program?

WHAT SHOULD BE EVALUATED?



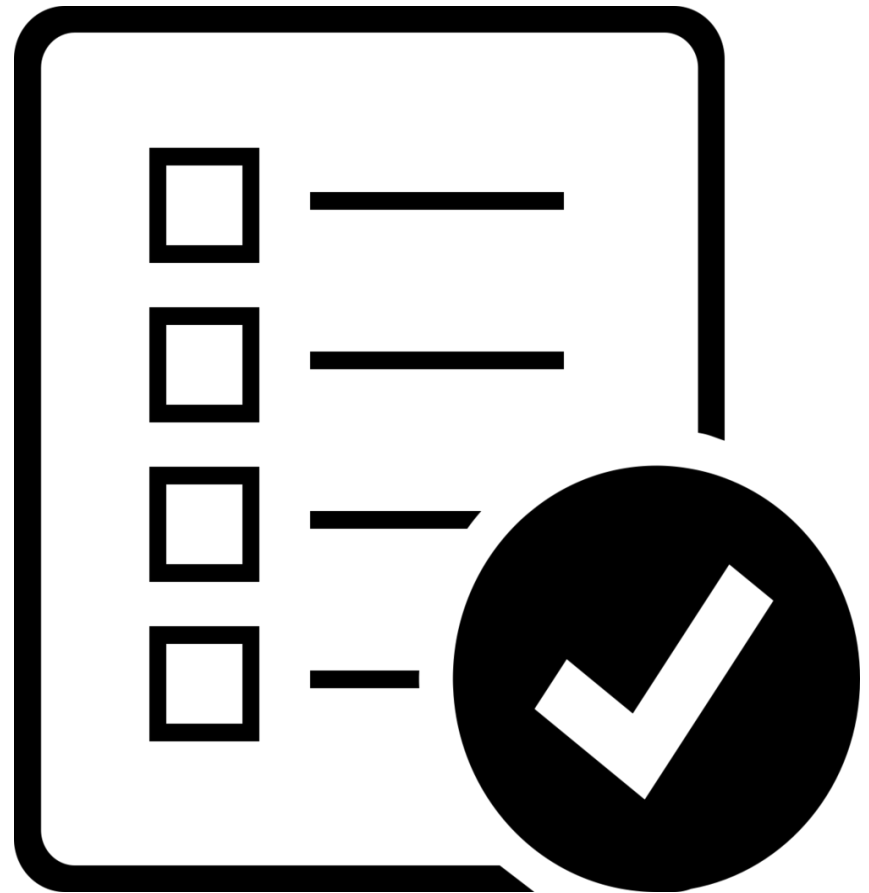
KEY QUESTIONS TO CONSIDER



- Who will use the results? (audience)
- How will the results be used? (what decisions will be made based on evaluation results)
- What do the program's clients expect from it? (program objectives)
- Who is carrying out the evaluation? (appropriate evaluation techniques)

APPROPRIATE METRICS

Metrics should be derived from the measurable objectives established for the program





AUDIENCE PARTICIPATION

Poll: What method of program evaluation do you use the most?

- A. Incident Reporting (Anecdotal)
- B. Kirpatrick Evaluation
- C. Balance Scorecard
- D. HR Dashboard
- E. Other _____

HIERARCHY OF EVALUATION

Kirkpatrick's Level of Evaluation

Organizational
Results

Behavior
s

Learning

Reaction

Succession Planning Evaluation

Organizational
Results

Effective
Placements

Program
Progress

Customer
Satisfaction

HOW SHOULD PROGRAMS BE EVALUATED?



ANECDOTAL EVALUATION

- Dramatizes good and bad practices
- Draws impetus for change

However

- Lacks rigor
- May not be representative of entire program



GUIDELINE FOR EVALUATING SP

Type/Level	Examples	Guidelines for Development
Customer Satisfaction	<ul style="list-style-type: none"> △ "Happiness reports." △ Informal interviews with "clients" at all levels. △ Group discussion in succession planning meetings. 	<ul style="list-style-type: none"> △ Design a survey form that can be easily tabulated. △ Ask questions to provide information about what you need to know: attitudes about each component of the succession planning program. △ Allow for anonymity and allow the respondents the opportunity to provide additional comments.
Program Progress	<ul style="list-style-type: none"> △ Examine individual movements through the organization. 	<ul style="list-style-type: none"> △ Design an instrument that will provide quantitative data. △ Include "pre" and "post" level of skill/knowledge in design. △ Tie evaluation items directly to program objectives.
Effective Placements	<ul style="list-style-type: none"> △ Performance checklists. △ Performance appraisals. △ Critical incident analysis. △ Self-appraisal. 	<ul style="list-style-type: none"> △ Base measurement instrument on systematic analysis of key positions. △ Consider the use of a variety of persons to conduct the evaluation.
Organizational Results	<ul style="list-style-type: none"> △ Organizational analysis. △ Speed of replacement. △ Cost of replacements. △ Cost of nonreplacements. △ Turnover. 	<ul style="list-style-type: none"> △ Involve all necessary levels of the organization. △ Gain commitment to allow access to organization indices and records. △ Use organization business plans and mission statements to compare organizational needs and program results.

STEPS FOR COMPLETING PROGRAM EVALUATION

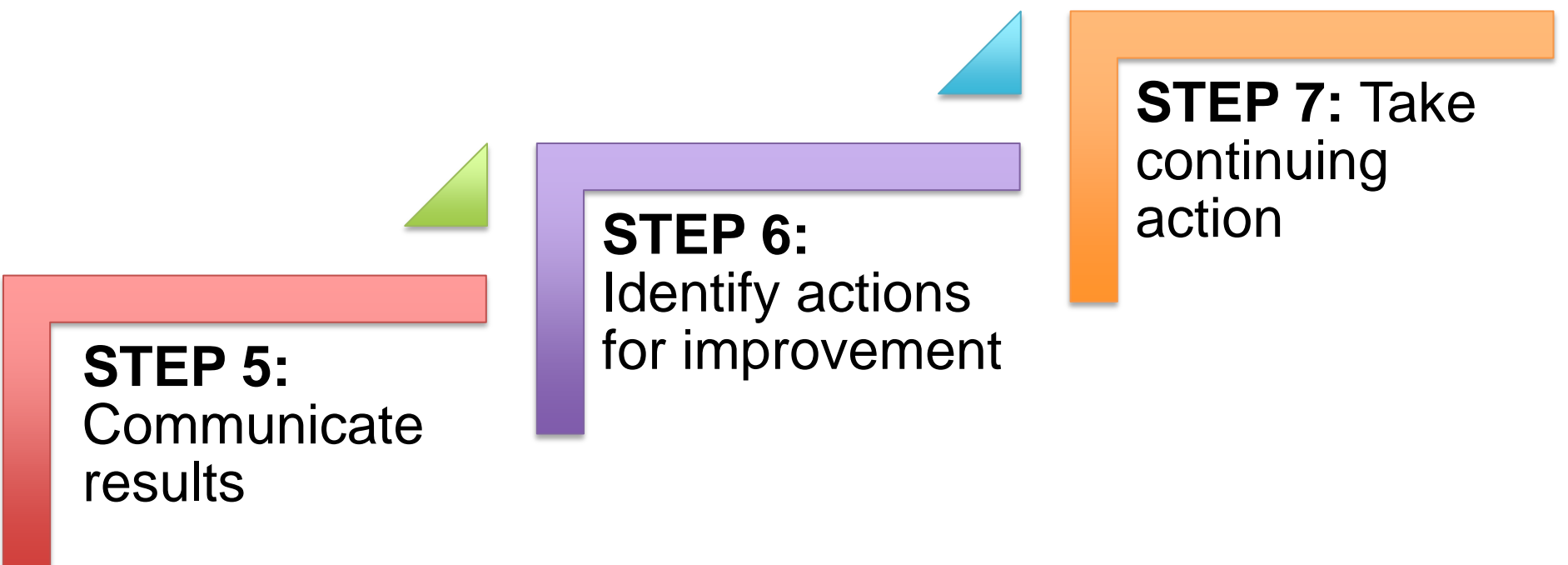
STEP 1:
Assemble
committee

STEP 2:
Brief
committee

STEP 3:
Conduct
background
research

STEP 4:
Analyze
results

STEPS FOR COMPLETING PROGRAM EVALUATION (cont'd)

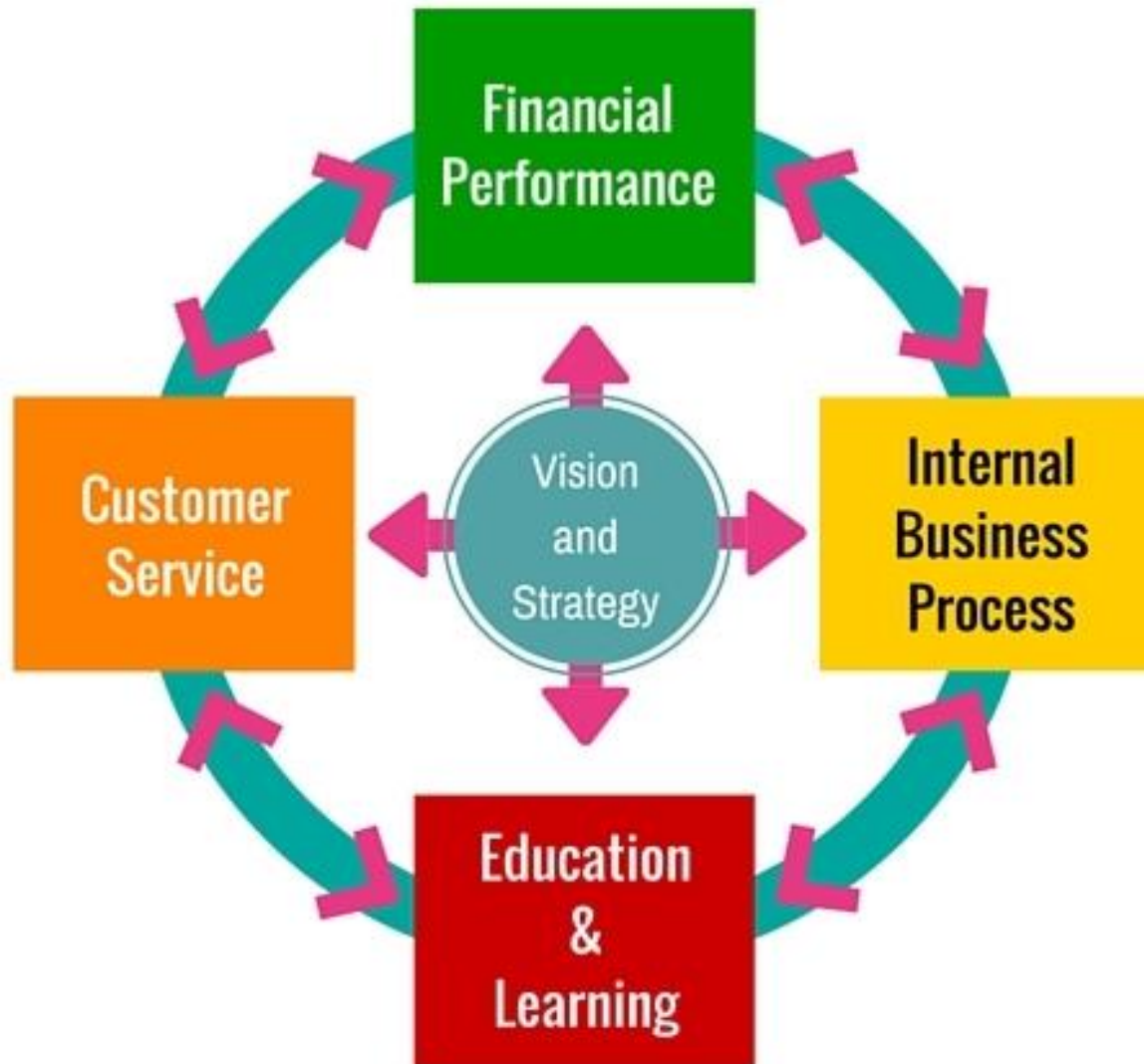


STEP 5:
Communicate
results

STEP 6:
Identify actions
for improvement

STEP 7: Take
continuing
action

BALANCE SCORECARD EVALUATION



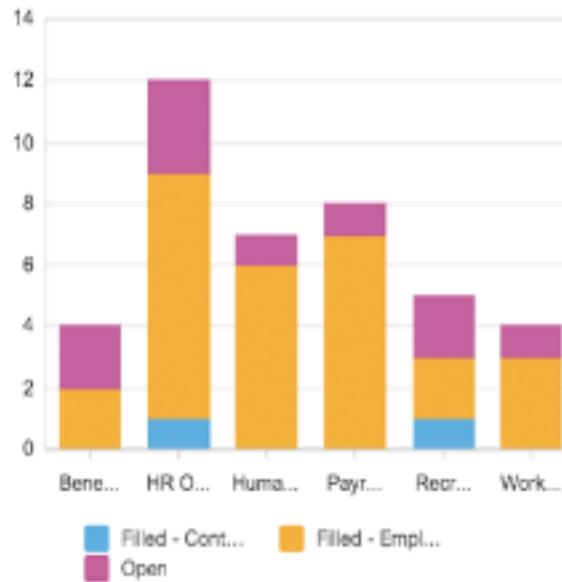
HR DASHBOARD EVALUATION

Workforce Visibility



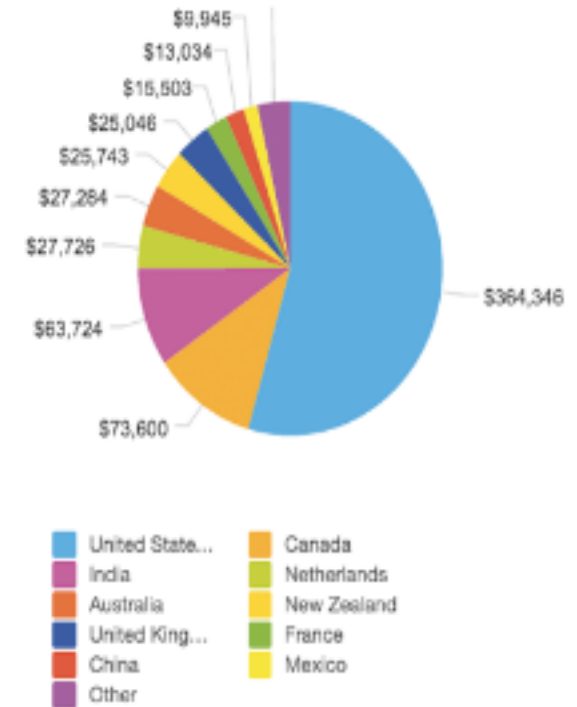
Count 347

Headcount & Open Positions



Count 40

Cost to Move Employees to Base ...



Cost to 50th Percentile - Average \$669,287

Hires and Terminations by Quarter



Average Time to Fill Positions



CURRENT PRACTICES IN HEALTHCARE



CURRENT PRACTICES – TALENT POOL

of candidates for identified positions

Parsed / Filtered by

- Readiness
- Potential
- Risk of Loss
- Impact of Loss
- Performance



CURRENT PRACTICES - PROGRAM

Effectiveness of Succession Program

- Turnover Rates-
 - ✓ System wide
 - ✓ Entity / Community Hospital specific
 - ✓ Job Category (nursing, allied health, etc.)
- Succession candidates
 - ✓ Retention of succession candidates
 - ✓ % of open positions filled from within by succession candidates verses % filled from outside organization
- Sustained continuum of patient care
 - ✓ Time to fill open position
- Return on Investment
 - ✓ Overall recruiting costs
 - ✓ Overall cost to cover open positions(overtime, etc.)

CURRENT PRACTICES – COMMUNICATING

Communicate ongoing program progress

- Dashboard
 - ✓ System-wide Metric Dashboard
 - ✓ 6 month cadence
- Online Resource Center
 - ✓ Definitions of metrics
 - ✓ Best practices of talent management along entire continuum



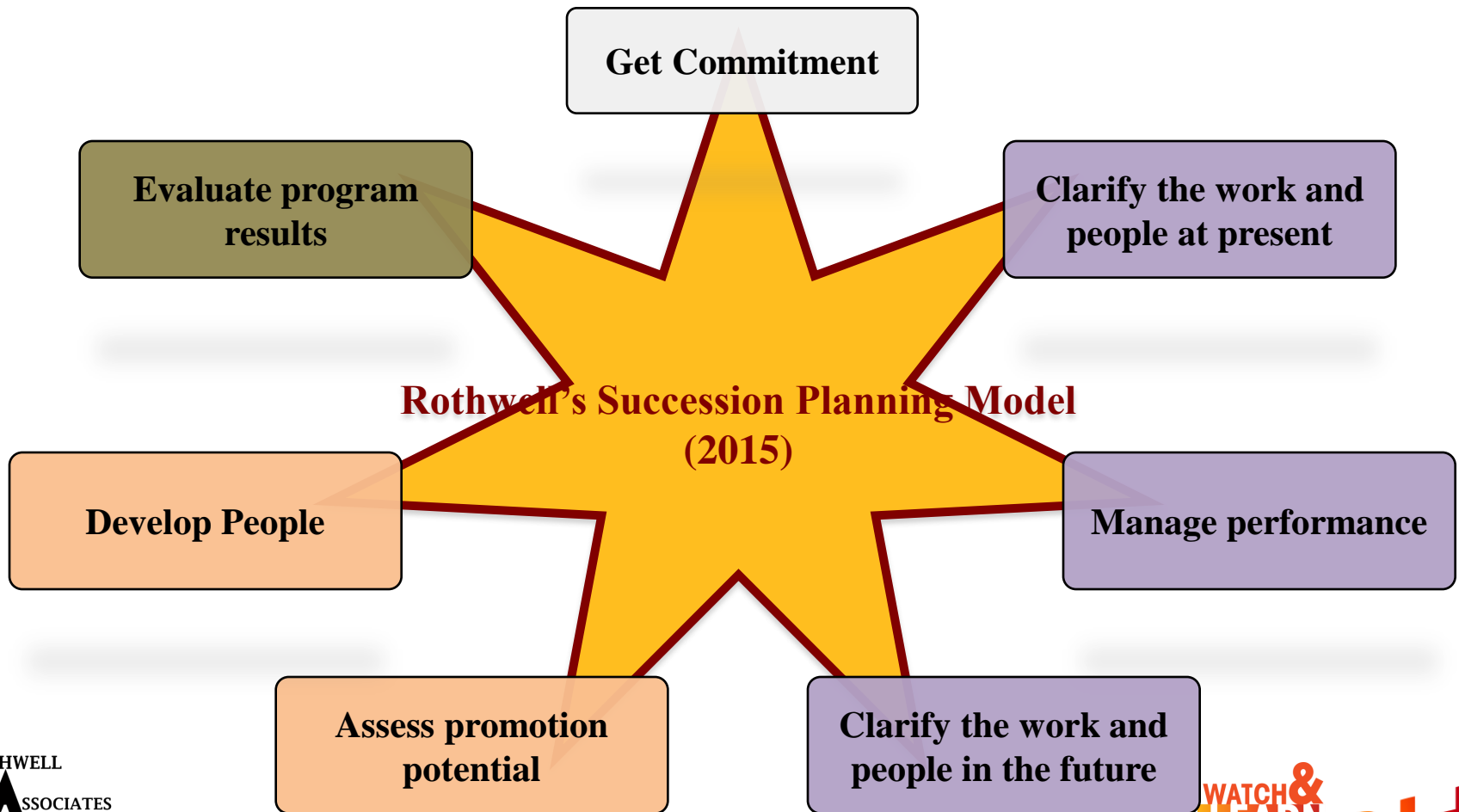
CURRENT PRACTICES – COMMUNICATING (cont'd)

Best practices of talent management along entire continuum

- **Recruit**
 - Behavior based interviewing training and support materials
 - Panel interview guides
 - Onboarding checklists
 - 30-60-90 day practice
- **Retain**
 - Employee Engagement Playbook for Leaders
- **Reinvest**
 - Development venues individual and organizational
- **Recognize**
 - High potential program
 - Aspiring Leaders ERG
 - Mentorship Program

WEBCAST SERIES

ROTHWELL'S SP MODEL





Question



Answer