

Be Proactive about Governance Support Succession Planning

The “Great Resignation” has had a major impact on the healthcare industry. People in all professions—from nurses to doctors to senior executives to ancillary workers—are flocking towards retirement, new jobs, or just reevaluating their careers. Governance support is not unique in this aspect and holes in this position can leave organizations scrambling to find a new gatekeeper to governance. This trend is likely to persist in the following years. This article provides recommendations for setting up more robust governance support succession plans that provide piece of mind for sudden departures and smoother transitions for planned turnover.

Always Plan Ahead

No matter what stage in their career, it is wise for governance support staff to work with their boss and HR to develop a succession plan well before it needs to be implemented. At the very least, the plan should:

- Highlight competencies and experience needed for the role. This can be an up-to-date, thorough job description.
- Identify a back-up person just in case the departure is sudden or there is a gap in finding a replacement. This person should be trained to step in when needed. This can also be helpful if someone is unexpectedly out for an extended period due to an emergency or illness.
- Outline the ideal transition plan (e.g., how long would the transition period be, will the current person support them during this transition period, what training needs to be done, etc.).

The best-case scenario is when someone plans ahead to leave their role, such as with a retirement or anticipated leave. When this happens, it’s important to give sufficient notice so the search process can begin or someone internally can be identified and trained. Since governance support is complex, it’s helpful to have a transition period where the current person can serve as a mentor to the successor. In this role, they can:

- Make introductions, if necessary.
- Have them attend meetings, educational sessions, and retreats.
- Train them on the board portal and other technological workflow tools.
- Participate in board support tasks, such as creating meeting books and agendas.
- Learn where key documents are stored.
- Become educated on the organization’s board/committee structure.
- Explain the “why” – governance is complicated, so it is helpful to clearly understand why they are doing the things they are doing.

For example, at one health system, the governance support specialist let her team know about her retirement a year ahead of time. They then were able to identify someone internally and she started training them six months before her leave. The governance support specialist and her successor had daily meetings and several trainings. Gradually, she took over her role, which allowed for a seamless transition.

Cross-Train, Standardize, and Build Community

Unfortunately, not all turnover is expected. In fact, more often than not, this happens suddenly, so cross-training is an essential piece of proactively planning for possible departures. Even if there is no intention of someone exiting the organization, it can be helpful for current governance support staff to serve as a mentor to other executive/ administrative assistants or even project or office managers who may want to expand their current scope of work and learn about governance support. This can essentially

→ Key Takeaways

- Develop a succession plan well before it needs to be implemented that highlights competencies and experience needed for the job, identifies a back-up person, and outlines the ideal transition plan.
- For health systems with multiple boards, cross-train governance support staff, standardize processes, build relationships, share best practices, and create a positive, inclusive culture.
- Document all governance processes and procedures and keep governance-related documents up-to-date and organized.
- Be intentional about reducing turnover by finding out why people are leaving and developing an environment that makes people want to stay.

serve as “back-up training” and help develop a pool of possible candidates should that person decide to leave.

Cross-training can be more challenging for hospitals with only one governance support professional. They will want to identify an administrative assistant to train, such as someone else who regularly takes minutes and attends board committee meetings to support their executive (e.g., the administrative assistant in finance who supports the finance committee). This person needs to be willing to take on this responsibility, have approval from their boss, and understand the value of this relationship.

For health systems with multiple boards, cross-training among the individuals who provide board support is more easily accomplished. This can go beyond mentoring to include various education, development, and relationship-building opportunities. A few helpful tips are to:

- **Ensure that governance support staff have a robust orientation.** They need to clearly understand their role and why strong governance is essential to the success of the organization. Having a firm grasp of the importance of their role right out of the gate will help them understand and find meaning in their work, which leads to longer-lasting, more knowledgeable employees.
- **Standardize processes and educate governance support staff.** Standardize governance work across the system, including minute-taking and record-retention guidelines, agenda templates, board portal software, and board education and evaluation processes. The more standardized the approaches across the system, the better. There should be ample communication about this standardization and the purpose—to improve governance across the system. There should also be trainings on technological tools such as board portal and digital workplace software. Ensure that workplace software tools are fully utilized, as well. They can allow governance support staff to connect and collaborate or quickly access needed tools. This level of standardization will allow people to fill in for others more easily since they will already be familiar with the process and tools to do the job.
- **Build relationships among governance support professionals across the system.** Encourage governance support professionals to network. Hold regular calls where all governance support staff have a chance to connect and share information, tips, challenges, and successes. These calls should be more than just an update from the system support staff on what’s coming up. They should be a chance to dive deeper into specific areas of importance and connect.

Encourage all governance support staff to meet at different times as well so they are frequently communicating to share best practices and solve common problems together.

- **Develop a “we are a team” culture.** System governance support professionals should lead the effort to build teamwork and a culture where everyone feels supported in their role and comfortable asking questions and sharing their thoughts.

If governance support staff are using standard processes, working together, and feel connected, it will be much easier for someone to step into a different governance support role. Developing this positive culture will also most likely lead to more people wanting to be considered as candidates for an open position so they can level-up their skills.

Document Governance Processes and Procedures

Ensure that all governance processes and procedures are thoroughly documented, and governance-related documents (e.g., charters, policies, bylaws, meeting materials, rosters, orientation manuals, and the annual calendar) are current and well organized so that someone coming into the role can easily find them. Having access to this information will allow the successor to better understand how things have historically been done and have the tools needed to hit the ground running. Otherwise, the new board support person may need to spend precious time searching for or, even worse, recreating these procedures and documents.

Be Intentional about Reducing Turnover

While we can't always predict when people will decide to move on, organizations can find ways to reduce turnover. For example, ensure that someone is conducting exit interviews and asking questions such as, “What could we have done differently to make your job more satisfying? Less stressful? More meaningful?” Any insights gained here will be critical to helping your organization understand why they left, and what can be done to ensure this doesn't continue to happen.

Creating a positive culture is always the first step to reducing turnover. System-level support professionals should ensure that they are creating community among the support staff. This includes promoting team building, communicating clearly and often, and ensuring everyone has the education and tools they need to feel supported in their work. It is also important that there is not an “us vs. them” mentality among

system and subsidiary support staff and that there is an inclusive process for sharing ideas and developing materials.

Conclusion

Governance support succession planning may not be top of mind for those in this very busy role but planning ahead is a must. There is always a possibility of turnover—even in the best, most-loyal employees. Plus, if you are the one who decides to leave, don't you want to set the next person up for success? This level of prep will allow for a smooth transition, which in turn will help ensure the board is able to continue their work without interruption.

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