

Succession Planning and Career Development

Emergency **M**edicine **A**ssociation of **R**esidency **C**oordinators

This information was obtained from:
International Association of Administrative Professionals
<http://community.iaap-hq.org/home>

Table of Contents

Succession Planning and Career Development	7
Understanding Succession Planning.....	8
Step 1—Personal and Organizational Awareness	11
Step 2—Career Planning.....	13
Step 3—Career Development	21
Step 4—Career Enrichment	23
Personal Action Plan for Succession Planning and Career Development	24
<i>Appendix</i>	25

Succession Planning and Career Development



Overview

Succession planning is one of the last things people and organizations think about when, in fact, it should be one of the first. In this course you will learn how career development discussions, updated job descriptions, effective Learning Management Systems, mentoring and other processes can help prepare someone to take over your duties so that you move into more responsible positions and advance your career.

Learning Objectives

Upon completion of this course, participants will be able to:

- Understand the importance of succession planning for themselves and their organization
- Recognize the four phases of career success
- Identify the difference between coaching, mentoring and managing
- Identify what is and is not appropriate for a mentoring relationship
- Utilize techniques for updating their job description
- Find resources to enrich their careers

Understanding Succession Planning

Succession planning is a process whereby an organization ensures that employees are recruited and developed to fill each key role within the company. Organizations with succession planning take a proactive approach to keeping things running smoothly and successfully, even as the most experienced employees retire.

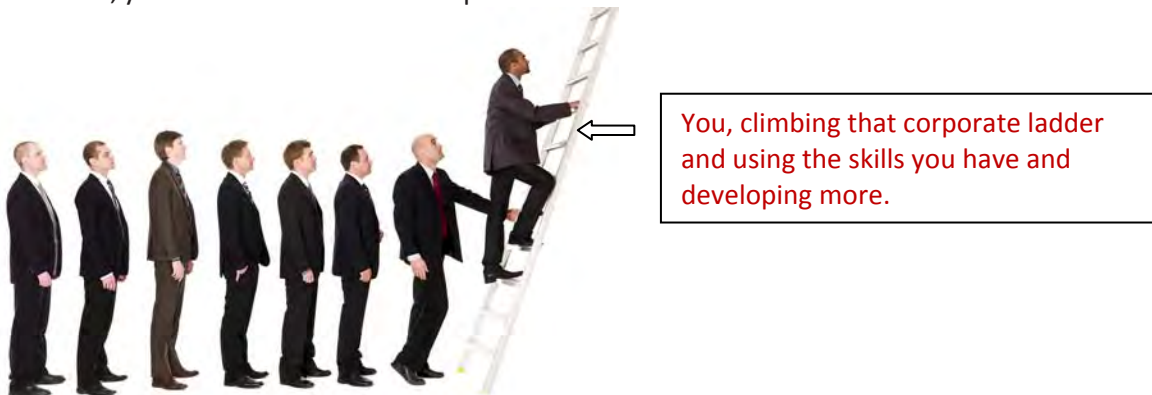
With a succession planning process, the company will recruit superior employees and develop their knowledge and skills to prepare them for advancement or promotion into more challenging roles. This involves training, mentoring and sometimes job rotation in order to pass on the necessary knowledge, skills and competencies needed to fulfill job responsibilities.

What Succession Planning Means For You

How do you prepare for career advancement? You need a personal plan and you need to understand your organization's succession plan.

An organization with an effective succession plan recognizes the importance of promoting from within and develops their employees. Whenever a vacancy occurs, the organization has many qualified candidates internally that may be considered for advancement.

Of course, you want to be in that talent pool.



Getting to the next level and beyond

Developing employees for retention and promotion has always been part of an organization's succession planning; however, it has never been more important than it is today. The cost of acquiring new, skilled and proven workers is expensive. To be able to grow and develop a person who is already part of the organization is a wise business decision for organizations.

Career development is your search for fulfilling your career potential and gaining personal satisfaction in your work. It involves:

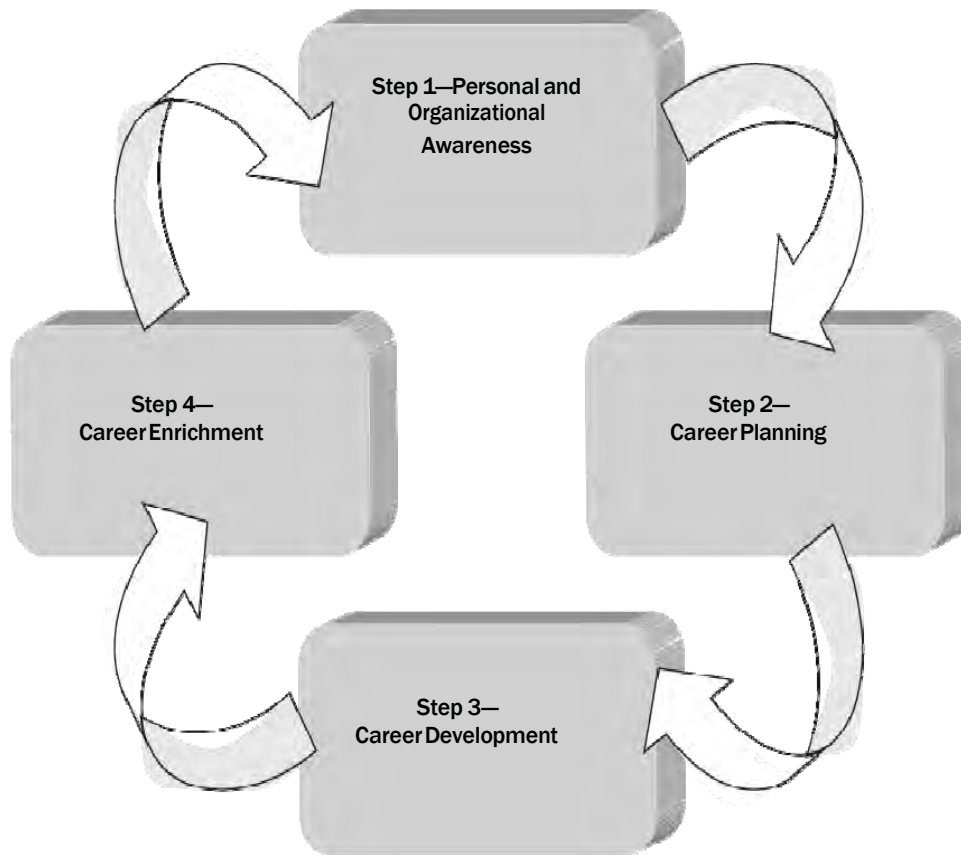
- Personal awareness of your potential, your fullest capabilities, values and interests
- Personal awareness of your organization, the succession plan and how people are selected for leadership programs or promotion
- Looking for opportunities, making discoveries, taking risks, growing and taking action. Career development is working today with one eye on your future. It is knowing where you are going. It is not a plan or a blueprint fixed in advance. Developing your career is a process, continually unfolding, shifting and changing.

Why it is vitally important to understand the dynamics of Your Workplace

Every organization has its own culture, its own politics, its own hierarchy. Understanding the dynamics of your workplace often allows you to take advantage of or create opportunities for promotion. Do you thoroughly understand yours? Here are some tips to help you:

1. Analyze your boss
2. Analyze your organization's job-changing and promotion process
3. Discover who really has power within your organization
4. Identify the individuals within your organization who have already established themselves as promotable people

Career advancement



Step 1—Personal and Organizational Awareness

Facilitated discussion

- How do you get promoted within your organization?
- Describe your organization's success plan?
- Is there a mentoring program?
- Have you reached out to anyone in your organization about career development?
- If you do not want to be promoted, what types of things are available for your career enrichment?

Individual Exercise—Know Yourself

Before you can plan how to get where you want to go, you have to know where you want to go. That's the first step in career planning, perhaps the most important step you will take in your professional life.

Know yourself

1. Do you perform better in an office or out in the field?
2. Do you prefer to work as part of a team or alone?
3. Would you feel more comfortable in a small company or in a large corporation?
4. Do you have entrepreneurial traits?
5. Are you more comfortable making decisions or letting others lead?
6. Do you have the need or desire to move up the corporate ladder?
7. Are you prepared to devote time and energy to your career?

Depending on how you answered these questions, you may choose to stay where you are or search for new opportunities.

Future Plans

Write three concise sentences that describe where you want your career to be in the next three years. Write two sentences that describe the major steps you plan to take to make this happen. Write one sentence describing the reason you want this advancement.

Where you want to be:

- _____

- _____

- _____

Major steps to get you there:

- _____

- _____

Reason you want advancement:

- _____

Step 2—Career Planning

Career planning is essential to everyone’s career. It is not something that should only be done once. Actually, it is an ongoing activity that should be done on a regular basis. Even if you have no plans to change jobs and you’re not interested in a promotion, you want to plan how to learn and grow in your position in a way that enriches your job.

Here are some things you can do to get started on your career plan.

- 1. Chart your path**—Identify changes in your job since the last time you did a career planning session. Notice if you have been given an “invisible promotion.” Have you received any accolades, recognitions or rewards? Have you made some significant mistakes? Does your current job lead to the type of future work you want to be doing?



- 2. Identify likes and dislikes ... needs and wants.** As you grow, things change and the tasks you once enjoyed may be mundane and routine now. They present no challenge, so you feel you are stagnating in your job. Think about this and identify what your next job would ideally have ... or not have ... that your current job does.
- 3. Think “transferable” skills**—One of the best things to do when you are considering your future is to take some time to think about the skills you have that are transferable to a new job. Don’t think in terms of your title. Think in terms of your skill sets. As an admin, you have, no doubt, developed a wide range of readily transferable skills.

Updating Your Job description

Your job description is a critical component of career development not only for you but for managers and other employees. A job description can be used for:

- Hiring
- Supervising
- Training
- Workplace coordination
- Conditions of employment
- Level of authority/reporting hierarchy

If you are leaving your position and helping to hire and train your replacement, your job description can be an important part of the interviewing process because questions about the specific duties can also be asked as part of the interview process. You can measure the candidate's résumé of skills and qualifications against those responsibilities listed in your job description.

If you are looking for a new position, a well-written, current job description helps present yourself in the most positive manner possible. By including all those responsibilities you have gotten in your "invisible" promotion, you can demonstrate the actual amount of authority and responsibility you have.

Steps in updating your job description

1. Conduct a thorough inventory of your formal and informal tasks, duties, roles and responsibilities
 - a. List them in priority order of most to least important
 - b. Indicate frequency of each task, etc.
 - c. Include any responsibilities where you coordinate with other staff members, teams and departments
2. Add new responsibilities as they are included in your workload
3. Add new skills you acquire through training that contribute significantly to your role
4. If appropriate in your organization, include your job grade and appropriate supervisory position
5. Review other job descriptions at your same level and above
 - a. Note where your tasks, responsibilities and functions align with those of another position
6. Understand how your position fits into a career path
 - a. How do your responsibilities fit into a career path?
7. Get input from other personnel in similar positions or with similar work responsibilities
8. Amend your existing job description to include all new information

Sample Job description



Description: Residency Coordinator (from EMARC)

Residency Coordinator Job Purpose: It is the responsibility of the Residency Program to provide a structured educational program for the benefit of the residents.

The Residency Coordinator/Assistant, under the direction and supervision of the Program Administrator/Manager is responsible for assisting in the administration of the residency program as outlined in the Accreditation Council of Graduate Medical Education (ACGME)/American Osteopathic Association Emergency Medicine Program Requirements.

The Residency Coordinator/Assistant provides administrative support to the Program Administrator/Manager and Program Director of the residency (and fellowship programs, if applicable), Chief Residents, and provides support to faculty residents, and fellows. Interacts with faculty, residents, fellow(s), medical students and institutional and regulatory administrative offices as directed by the Residency Administrator/Manager.

Essential Qualities:

- Demonstrate exceptional organizational skills
- Demonstrate ability to independently prioritize work
- Demonstrate initiative
- Demonstrate ability to utilize resources effectively
- Demonstrate critical thinking and problem solving skills
- Demonstrate effective written and verbal communication skills
- Demonstrate proficient computer skills
- Demonstrate ability to adapt and adjust to new or changing situations
- Demonstrate exceptional interpersonal and communication skills
- Demonstrate the ability to maintain confidentiality

Basic Knowledge Requirements:

- Understand the dynamics and objectives of the Emergency Medicine Residency and its relationship with the primary institution and participating institutions.
- Understand the management structure of the residency and maintains effective relationships with supervisors and co-workers.
- Understand general human resource functions and principles.
- Understand general financial and budgetary processes and principles.
- Understand principles of record keeping and confidentiality (including HIPAA compliance).
- Understand ERAS software and applications.
- Demonstrate proficiency with computer applications, online resources and equipment utilized by the department and institution.
- Participate in institutional, departmental, community, and/or national meetings to remain informed about current academic trends and processes.

Behavioral Skills:

- Effectively receives supervision/ feedback from Program Administrator /Manager and Program Director.
- Able to organize, schedule, and prioritize work for self and others to meet deadlines.
- Able to utilize interpersonal skills to work effectively with others.
- Works positively to resolve issues by bringing concerns to the appropriate person(s).
- Perceive the pressures that physicians face and encourages residents to use appropriate wellness tools

Education/Knowledge Required:

- Associates Degree or 3 year graduate medical education experience
- National Board for Certification of Training Administrators of Graduation Medical Education Certification in Emergency Medicine is preferred.

Specific Responsibilities: Provides administrative support to Program Administrator/Manager and Program Director:

- Maintain Program Administrator/Manager and Program Director's calendar.
- Maintain and updates Program Director's *curriculum vitae*.
- Draft and/or transcribes letters, reports, e-mail and other written communications.
- Handle ongoing communication to and from visitors and others efficiently, notifying appropriate personnel.
- Maintain documentation of curriculum, accreditation documents, manuals, conference handouts, manuscripts, etc.
- Respond to inquiries regarding residency, fellowship, student rotations, and other training issues.
- Alerts the Program Director and/or Program Administrator/Manager of any potential concerns based on written or verbal communications from faculty, residents or others.
- Provide other administrative assistance to Program Director as needed.

Coordinates the Emergency Medicine Residency Program:

- Coordinate the daily operations and logistics for the program.
- Adhere to procedures and systems that ensure orderly and timely workflow.
- Maintain knowledge of current medical licensure requirements, immigration policies, ACGME accreditation and institutional requirements.
- Implement and updates program databases.
- Coordinate with Chief Residents to maintain and distribute resident rotation schedules, call schedules, vacation/leave schedules, and meeting schedules.
- Coordinate outside electives which include applications to hospital(s), malpractice coverage confirmation, and evaluation forms.
- Process resident and faculty professional organization membership.
- Prepare and distributes the yearly and monthly assignment schedules of the residents.
- Distribute, collect, and tabulate all evaluations forms regarding residents, rotations and faculty and compiles and generates feedback for appropriate follow-up and reporting.
- Maintain confidential resident and fellow files.
- Coordinate Grand Rounds to include scheduling speakers, arranging speaker's travel and accommodations, and coordinating Grand Rounds presentation.
- Arrange BCLS, ACLS, PALS, and ATLS and re-certification training courses.
- Assist in the preparation of CME programs.
- Serve as liaison with other departments and affiliated institutions.
- Maintain departmental meeting minutes and develops reports as requested
- Prepares check requests, travel authorizations, fund reimbursements and expense reports; maintains necessary records for Medical Education and/or Accounting Department.
- Maintain biographical information on all residents and update information on alumni.
- Handle highly confidential material for residency, fellowship, faculty, and institution.
- Maintain Disaster Call schedule.

Coordinates the ACGME/AOA Accreditation and Reporting Requirements to External Agencies/Organizations:

- Comply, updates and submits reports to ACGME/AOA, American Board of Emergency Medicine (ABEM), American College of Osteopathic Emergency Physicians (ACOEP), American Association of Medical Colleges (AAMC), American Medical Association (FREIDA), and other professional organizations as directed by the Program Administrator/Manager
- Compiles, tabulates and reports data for surveys, questionnaires, census reports, accreditation reports and other forms and documents required by internal and external agencies and directed by the Program Administrator/Manager
- Collect necessary information for developing appropriate database analysis tools to meet current ACGME/AOA requirements
- Coordinate the administration of the ABEM or the ACOEP National In-training Examinations
- Prepare and distributes all post-graduation emergency medicine verifications
- Collect, complies, submits and maintains yearly AOA research papers and resident reports

Recruitment of Residents and Fellows:

- Coordinate communication between applicants and program via e-mails, telephone and written correspondence
- Serves as an information source for the program, institution(s) and community
- Adhere to recruitment plan, time-line, guidelines, and policies and procedures for the department
- Maintain all interview materials used by faculty, residents and applicants
- Manage review of residency applications using the ERAS system as directed by the Program Administrator/Manager
- Screens fellowship applicants for compliance with prerequisites, if applicable
- Coordinates all resident interviews and communications with applicants
- Coordinates applicants' interview day

- Plans and arranges interview social activities
- Manages ERAS software to produce residency applications, reports, and rank list
- Tracks all evaluation scores of interviewed applicant and prepare data for initial match rank list
- Sends post interview thank-you letters to all candidates
- Participate in the resident ranking meeting
- Administers and reviews post match survey to applicants, recommends changes to improve next year's recruitment activities

Coordinates Appointments, Reappointments, and Termination:

- Coordinates general orientation of new residents and fellows (includes department, clinical areas and institution)
- Distribute and monitors the resident appointment and reappointment process
- Prepares and monitor resident completion and/or termination process
- Coordinates Information Service assignments such as pagers, voice mail, and computer access
- Inform incoming residents of documentation required by the primary institution and state licensing board and maintains records of compliance
- Coordinate all credentialing requirements of all initial appointments for interns and fellows as dictated by the primary and participating institutions as well as state licensing agency
- Instruct residents from foreign countries regarding the procedures that must be followed with INS, ECFMG and the state licensing board
- Assist new residents to ensure smooth transition to residency program

Provides Administrative Support for Residents and Core Faculty:

- Assist Chief Residents in creating yearly rotation schedule for residents, including yearly call, conference, and vacation schedules for the program
- Maintains and updates credentialing records/ *curriculum vitae* of core faculty
- Assist core faculty and residents in preparation of presentations, abstracts, manuscripts and other documents relating to the Emergency Medicine Residency Program
- Provide clerical assistance in preparing manuscripts for publication in various medical journals
- Assist in literature searches and articles retrieval as needed
- Provide support to committees as necessary
- Advise residents on departmental policies
- Attend resident meetings as requested
- Disseminate/distribute all training-related information to residents
- Prepare letters of recommendation/verification and maintains career resources for senior residents
- Prepare and distribute all post-graduation emergency medicine verifications
- Coordinate social and retreat activities for residents

Coordinates Medical Student Programs:

- Function as the first contact liaison to students, faculty, residents, community sites, and school administration for any issues or questions relating to the clerkship
- Provide primary support to the Clerkship Director(s) in matters relating to the clerkship and functions as his/her representative
- Coordinate daily operations of the clerkship, organizes and prioritizes necessary tasks, initiates changes and resolves issues as they arise
- Understand the curriculum, educational goals, policies, and standards of the clerkship and the medical school
- Monitor the student evaluation and grading process and maintain complete and accurate student files
- Understand the major responsibilities of other interacting departments, (i.e. medical student affairs, medical education, registrar, area health education center, bursar, and purchasing)
- Know the medical school calendar and courses offered
- Assist in the preparation of letters of recommendation
- Coordinate the Clerkship Lectures/Orientation series
- Prepare, administer, and grade required end of rotation exam

Coordinates the Fellowship Program(s):

- Coordinate the fellowship program and performs responsibilities similar to those outlined for the residency coordinator

Departmental Facilities and Resources:

- Maintain learning materials including books, journals, computers, CD-ROM's, and other audio-visual materials
- Assist and tutors residents/staff in the use of computers and applications
- Maintain teaching files and other board study materials for residents
- Maintain audio-visual equipment
- Maintain the ED conference room schedule

Additional Software and Equipment Skills:

- Windows applications
- Word processing applications
- Graphics applications
- Spreadsheet applications
- Internet applications
- Electronic Residency Application System (ERAS)
- Institution Patient Information Systems
- Institution/Department Intranet
- University/Institution computerized financial system
- Resident Tracking Software applications
- Standard Office Equipment
- Scanner
- Audio-Visual Equipment

ADDITIONAL DUTIES AND RESPONSIBILITIES:

- Actively participates in professional organizations such as EMARC
- Attends at least one professional development meeting per year

Facilitated Discussion

- Discuss the way the job description is written and how it could help you hire someone to take over your responsibilities
- If you wanted to be promoted, how would this job description help in the process?
- There is a high turnover of managers to admins today. How would this job description demonstrate to your new manager your capabilities?

Plan on updating your job description upon your return to work!

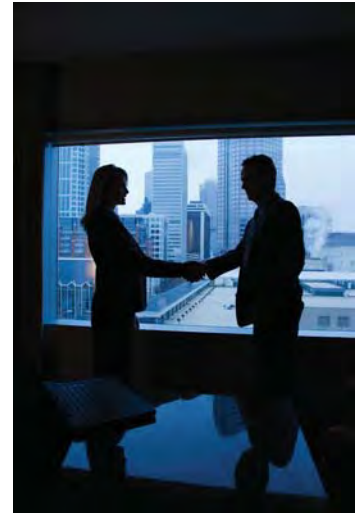
Step 3—Career Development

Consider finding a mentor:

Mentoring is most often defined as a professional relationship in which an experienced person (mentor) assists another (mentee) in developing specific skills and knowledge that will enhance the mentee's professional and personal growth. A mentor is generally more concerned with the long-term goals of developing an employee rather than the day-to-day productivity.

Excellent Mentors:

- Are self-aware and self-reflective
- Understand they have limitations and weaknesses
- Believe it is important to “know thyself”
- See themselves as they really are
- Hold themselves accountable for their behavior
- Model personal and professional competence
- Are self-governing
- Are humble
- Are sure their motives are appropriate
- Take care of themselves
- Always respect confidences
- Do not take on the role of a psychologist or personal counselor



A successful mentee will:

- Be willing to take a risk
- Be willing to put in the necessary time and effort required to develop the mentor/mentee relationship
- Respect his/her mentor's time
- Take critique with aplomb and without hard feelings, and learn from it
- Practice good listening skills
- Take responsibility for his/her own growth
- Take responsibility for his/her own actions
- Remember, a mentor is not a personal counselor

Mentoring should not be:

- Personal counseling
- A waste of company time
- Always the same in appearance
- Just coaching
- A negative experience
- A gripe session
- Filled with criticism

Individual Activity

Role models can come from any area of your life. Select two people and discuss why you selected them as role models. Would the attributes and characteristics of the people you selected as role models be the things you might want to seek out in a mentor?

List your two role models here.

1. _____

2. _____

Explain why you selected each role model.

1. _____

2. _____

Step 4 – Career Enrichment

All careers need enrichment. They need to be nurtured and tended to from time to time. Whether you are striving for a new position, expanded responsibilities or simply doing the best you can at the job you have, you will want to continually engage in some activities to enrich yourself.

Enrichment activities:

- Engage in ongoing professional development
- Consider a mentor or coaching to refine the skills you have
- Improve your interpersonal relationships ... it will benefit all areas of your life
- Recognize and reward yourself for your accomplishments
- Put some passion into your work
- Identify the value and significance of what you do
- Always have a backup plan

Small group activity

Work in small groups and discuss other ideas for career enrichment activities. Be prepared to share them with the class.

Personal Action Plan for Succession Planning and Career Development

Take some time to reflect on all the information that was discussed during this session and complete the following questions.

Stop: What will I stop doing as a result of today's session? Why?

Start: What will I start doing as a result of today's session? Why?

Continue: What should I continue doing as a result of today's session? Why?

Appendix

Request for help

At times it may be helpful for a mentor to receive information about a problem the mentee is having prior to a planned meeting. It may also be helpful for the mentee to constructively think through the problem before meeting with the mentor.

1. Identify the problem and why you consider it to be a problem

2. Identify behaviors or actions you have used attempting to solve the problem

3. Have any of these behaviors or actions made a difference in solving your problem? How?

4. Identify possible solutions you have not attempted. Together, the mentor and mentee should consider options and develop a plan of action.

5. My plan of action is to:

“What do I want and need in a mentoring relationship?”

Worksheet

Carefully consider each of the following questions and write honest and realistic responses.

1. Where am I on the career ladder?

2. What are my career goals?

3. Do I foresee a career change in my future? If so, why? If not, why not?

4. What are my strengths?

5. How do I deal with interpersonal relationships at work?

6. Could any of my current relationships develop into a mentoring relationship?

7. What am I looking for in a mentor?
