

# "Preparing Banner for the Future: Leadership Matters!"

Peter S. Fine
President & CEO
Banner Health



## Leadership Behaviors

### Leader Behaviors (additional for all leaders)

#### People Above All

#### **Optimize Organizational Talent**

Creates an inclusive and safe environment where people can thrive

Identifies and promotes talent by providing opportunities for growth

Engages employees in improving individual and team performance

#### Excellence

#### Shape the Future

Acts as a change champion

Performs effectively in an ambiguous and complex environment

Actively engages others in our goal of achieving Industry Leadership

#### Results

#### **Executive Presence**

Exhibits energy, excitement, enthusiasm, and courage

Effectively communicates to, and influences a variety of audiences

Builds credibility and trust through visibility



## 3 Pillars

**Accountability** 

**Transparency** 

**Discipline** 



## **Talent Management Review Cycle**



### Purpose:

- Organizational process that helps to ensure Banner has the necessary talent to fulfill our non-profit mission and achieve Industry Leadership
  - Right People, Right Skills, Right Roles, Right Time

#### **Process:**

- 5-step process over 6-month period
  - 1. 1:1 with direct report to check-in on aspirations
  - 2. Gather data in preparation for calibration session
  - 3. Conduct calibration session with peers
  - 4. Provide feedback to direct report
  - 5. Enter information into online profiles (9-box placement, readiness, succession plans, etc.)

#### **Outcome:**

 Snapshot of bench strength, succession plans, developmental needs, and areas of risk

### [Potential / Promotability]

Low Middle High

#### Seasoned Professional

Results: Meets the needs of others and is highly competent in fulfilling all responsibilities of current position. Promotes the talent of others by identifying and implementing opportunities for growth and development. Recognizes and implements change appropriately and facilitates the complex transitions associated with change. Thinks strategically and presents their ideas using calm, sincere, and authentic communication. Performs successfully in current role and looked upon with high regard as a "Seasoned Professional".

<u>Potential:</u> Problem-solver with awareness of broader strategies and ability to connect the dots to improve team, department, and/or facility. Either has expressed desire to stay in current position or requires substantial growth as a leader in order to effectively move into a higher level of leadership. Well placed in current role.

#### **High Professional**

Results: Proactively seeks out and secures opportunities for development for self and others. Serves as a catalyst of change and successfully leads others through significant change. Maintains an organizational lens, identifies interdependencies, and takes planful action. Passionate about their work and routinely exemplifies the values of Banner Health. Performs exceptionally in current role and looked upon as a "High Professional".

<u>Potential:</u> Strategic problem-solver whose emphasis on stakeholder support, awareness of broader strategies, and ability to incorporate multiple perspectives enables them to accomplish organizational initiatives expressed aspirations for higher level leadership positions or positions with greater scope and responsibilities. Though highly effective functionally, may need minor development to excel in next leadership role (e.g., 1 level up).

#### Superstar

Results: Consistently achieves successful and high-impact results. Strives for continual improvements and works tirelessly to optimize the talent of others. Anticipates systemic changes and effectively leads others through complex changes by stimulating innovative ideas and simplifying ambiguities. Embodies the essential qualities of composure, self-confidence, and honesty expected of senior leaders at Banner Health. Respected by others and looked upon as invaluable employee and member of team/department (i.e., a "Superstar").

<u>Potential:</u> Visionary, facilitative problem -solver who promotes proactive stakeholder engagement and empowers others to implement and achieve organizational initiatives. Expressed aspirations and is immediately ready to adeptly and successfully perform in higher level(s) leadership position(s) or position(s) with greater scope and responsibilities.

Keepers

#### Solid Professional

Results: Meets the expectations of the position, and looked upon as a "Solid Professional". Makes some efforts to optimize and develop the talents of others, and is effectively able to navigate and/or lead through complex change. Comes across to others as thoughtful, confident, trustworthy, and open to new and innovative ideas.

<u>Potential:</u> Tactical problem-solver with an awareness of broader strategies and a focus on incremental improvements within team/department/facility. Either has expressed desire to stay in current position or requires substantial growth as a leader in order to effectively move into a higher level of leadership. Well placed in current role.

#### Growers

#### Valued Contributor

Results: Effective in meeting the needs of their customers and fulfilling the requirements of the position. Demonstrates interest and makes significant effort to grow and develop the talent of others. Performs effectively in an ambiguous and complex environment, and acts as a change champion. Builds credibility and trust with others and utilizes this to effectively communicate to, and influence a variety of audiences. Viewed as a "Valued Contributor" to dept/facility/organization.

<u>Potential</u>: Strategic problem-solver with awareness of broader strategies whose focus is on stakeholder input and buy-in and the integration of team, department, and/or facility improvements. Expressed aspirations for higher level leadership positions or positions with greater scope and responsibilities but needs additional development as a leader.

#### Keepers

## Growers Rising Star

Results: Performs all aspects of position well. Makes efforts to both develop the talent of others, and to engage others to improve performance in order to collaboratively achieve Industry Leadership. Maintains stability, and is an effective leader during times of change. Provides clear direction and communication to others while simultaneously focusing on both short-term objectives and long-term strategies. Consistently demonstrates energy, excitement, enthusiasm, and courage, and is looked upon by others as sincere and as a "Rising Star".

<u>Potential:</u> Facilitative orientation with focus on proactive stakeholder engagement that promotes participation and empowerment in accomplishing organizational initiatives. Expressed aspirations and is currently ready to competently and successfully perform in higher level(s) leadership positions or a position with greater scope and responsibilities.

Growers

#### Keepers

#### **Learning Professional**

Results: Consistently performs below expectations and fails to meet the requirements of the position. Makes no effort to develop the capabilities of others or to challenge self or others to improve. Resistant to change, and comes across to others as inconsiderate, judgmental, insecure, and aloof. Viewed by others as a "Learning Professional".

<u>Potential:</u> Tactical problem-solver whose focus is primarily on incremental changes within team/department/facility. Either has expressed desire to stay in current position or requires substantial growth as a leader in order to effectively move into a higher level of leadership.

#### **Future Utility**

Results: Does not meet the minimum requirements of their position, but looked upon as individual with some potential for growth and advancement (i.e., "Future Utility"). Places little effort to develop self and no effort to develop those around them. Often, opposes and/or avoids change, and does not engage others in achieving Industry Leadership. Shows little or no excitement and energy for their work, may sometimes come across as hypocritical of others, and generally communicates in an ambiguous or unclear manner.

<u>Potential:</u> Strategic outcome orientation with focus on stakeholder input and buy-in to accomplish organizational initiatives. Expressed aspirations for higher level leadership position or positions with greater scope and responsibilities but needs additional development as a leader.

#### Diamond in the Rough

Results: May not always meet the expectations of the position, but shows glimpses of excellence and ability to perform beyond expectations. Maintains inadequate balance between focus on self-development as compared to the development of others, and between short-term goals and long-term perspective. Occasionally, but not consistently, presents him/herself in the way a senior leader at Banner Health should. Viewed by others as a "Diamond in the Rough".

<u>Potential:</u> Facilitative orientation with focus on proactive stakeholder engagement that promotes participation and empowerment in accomplishing organizational initiatives. Although current performance is below expectations, he/she expressed aspirations for and is expected to perform effectively in a higher level leadership position or a position with greater scope and responsibilities.

#### Movers

#### Movers

Movers



## 9-box: Rising Star

### **Rising Star**

Results: Performs all aspects of position well. Makes efforts to both develop the talent of others, and to engage others to improve performance in order to collaboratively achieve Industry Leadership. Maintains stability, and is an effective leader during times of change. Provides clear direction and communication to others while simultaneously focusing on both short-term objectives and long-term strategies. Consistently demonstrates energy, excitement, enthusiasm, and courage, and is looked upon by others as sincere and as a "Rising Star".

<u>Potential</u>: Facilitative orientation with focus on proactive stakeholder engagement that promotes participation and empowerment in accomplishing organizational initiatives. Expressed aspirations and is currently ready to competently and successfully perform in higher level(s) leadership positions or a position with greater scope and responsibilities.

### Growers

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[Potential / Promotability]					
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## 9-box: Seasoned Professional

### **Seasoned Professional**

Results: Meets the needs of others and is highly competent in fulfilling all responsibilities of current position. Promotes the talent of others by identifying and implementing opportunities for growth and development. Recognizes and implements change appropriately and facilitates the complex transitions associated with change. Thinks strategically and presents their ideas using calm, sincere, and authentic communication. Performs successfully in current role and looked upon with high regard as a "Seasoned Professional".

<u>Potential:</u> Problem-solver with awareness of broader strategies and ability to connect the dots to improve team, department, and/or facility. Either has expressed desire to stay in current position or requires substantial growth as a leader in order to effectively move into a higher level of leadership. Well placed in current role.

Keepers

	[Potential / Promotability]						
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# Talent Management Review Process Two Cycles Using the 9-box Grid

[Potential / Promotability]

	Low	Middle	High
ve	Seasoned Professional	High Professional	Superstar
Highly Effective	<b>27.54%</b> (26.83% in 2015)	<b>14.49%</b> (15.85% in 2015)	<b>1.45%</b> (2.44% in 2015)
	Solid Professional	Valued Contributor	Rising Star
Effective	<b>36.23%</b> (32.93% in 2015)	<b>17.39%</b> (17.07% in 2015)	<b>1.45%</b> (1.22% in 2015)
Less Effective	Learning Professional	Future Utility	Diamond in the Rough
	<b>1.45%</b> (2.44% in 2015)	<b>0%</b> (1.22% in 2015)	<b>0%</b> (0% in 2015)

[Results]

N = 69 (Direct reports of EVPs & SVPs – does not include any SOT Members



## **Talent Showcase**

Banner Health - TMR Talent Profile - Administration Use Only

Data as of: 2/10/2016 @ 11:11 am Supervisor: Kuhn, Rebecca C; 180423

Employee: Johnson Foote, Mystie Leona: 103581

Employee Picture



Seasoned High Superstar Professional Professional Rising Star Solid Valued Professional Contributor

Learning **Future Utility** Diamond in Professional the Rough

Mobility - Interim: No Mobility - Permanent: Yes

Mobility Location - Permanent: Arizona, Region

Flight Risk: Low

VOICE Scores - Employee

Dimension Active Engagement Leadership Effectiveness Job Satisfaction

VOICE Scores - Clinician

Dimension 2014 2015 Active Engagement Leadership Effectiveness Job Satisfaction

Position: CEO BMG Service Line: Administration

Department: 2088110 - Physician Admin Facility/Entity: 0700 - Banner Medical Group

Date of Hire: 5/31/2011

Builds Credibility/Trust

Interpersonal Communication

70% Development Experience

70% Development Experience

20% Coaching and Feedback

20% Coaching and Feedback

10% Formal Education

10% Formal Education

Bachelor's

Coaching Skills

Strength

Date of Last Promotion: 1/31/2016 Last 2 Performance Ratings:

Successor(s)

SuccessorName IsInterim Readiness

Development Opportunity(ies)

Development Position(s)

2015

2014

**Type** Title Readiness

2

3

Strenath(s) StrengthPriority

**OpportunityPriority** DevelopmentOpportunity Executive Presence Coaching Skills Strategic/Systems Thinking

**Development Plan** <u>DevelopmentPlan</u> DevelopmentPlanEE

Enroll in MBA program in 2014

Recognize circumstances that trigger responses and manage responses in the moment. Spend each month reviewing the Blue Book Create feedforward team.

Discuss impressions of information with feedforward person

<u>DevelopmentProgress</u> **ModifyDate** Start Immediately 7/24/2015 11:32 am Started Sept 2013, occurs monthly 8/8/2014 10:07 am Invitations sent to feedforward team on 7/24/2015 11:32 am 7/24/2015

Started Sept 2013 8/8/2014 10:07 am 12/2013 - scheduled standing meetings with

feedforward. 1/2014 - completed

Complete by 8/1/2015

7/24/2015 11:32 am

Identify an educational resource. Consider a coach. Completed 4/17/2015 6/9/2015 11:20 am

Education

Degree Master's Executive Masters Business Admin. Doctorate Medicine

Biology

Grand Canyon Univeristy University of Arizona Grand Canvon University

**DateGraduated** 4/17/2015 5/31/1998 6/30/1994



## **Talent Showcase**

Banner Health - TMR Talent Profile - Administration Use Only

Data as of: 2/8/2016 @ 10:22 am Supervisor: Groves, Robert Hamilton; 214913

Employee: Holland, William W; 104797

Employee Picture



Seasoned Professional	High Professional	Superstar
Solid Professional	Valued Contributor	Rising Star
Learning	Future Utility	Diamond in

Mob Mob Star

Mobility - Interim: No Mobility - Permanent: No Mobility Location - Permanent: Flight Risk: Low

VOICE Scores - Employee					
<u>imension</u>	2014	2015			
ctive Engagement		61			
eadership Effectiveness	100				
ob Satisfaction		100			

VOICE Scores - Clinician

Dimension 2014 2015
Active Engagement
Leadership Effectiveness
Job Satisfaction

Position: CMIO

Service Line: Clinical Services

**Department:** 9073108 - Medical Informatics-Corp **Facility/Entity:** 0101 - BH Corporate Office

Date of Hire: 6/20/2001

Date of Last Promotion: 7/20/2014 Last 2 Performance Ratings: SuccessorName

the Rough

Degree

Doctorate

Doctorate

Bachelor's

Successor(s)
<u>IsInterim</u> Readiness

Education

 Maior
 College
 DateGraduated

 Family Medicine Residency
 Banner Good Samaritan Family Medicine Residency Prog
 6/1/2004

 MD
 Baylor College of Medicine
 6/1/2001

 Microbiology
 Texas A&M University
 5/1/1997

OpportunityPriority

Strength(s)

<u>Strength</u> Analytical/Problem Solving

Decision Making Innovation

Interpersonal Communication

Strategic Thinking

Development Opportunity(ies)

<u>DevelopmentOpportunity</u>

Delegation

Employee Development Financial Acumen/Budgeting

Development Position(s)

StrengthPriority

Type <u>Title</u> <u>Readiness</u>

Professional

Development Plan

 DevelopmentPlan
 DevelopmentPlanEE
 DevelopmentProgress

 70% Development Experience
 Will do the foundational work required to move our

information systems to those supporting an integrated care

delivery system.

20% Coaching and Feedback Will develop a team of physician leaders who can help

support informatics vision and goals.

10% Formal Education Will develop and implement a plan to standardize and

optimize Banner's approach to computerized physician documentation, support robust and innovative clinical decision support, and physician experience.

10/23/2013 8:50 am

**ModifyDate** 

10/23/2013 8:50 am

10/23/2013 8:50 am

## Senior Leadership Team



## Peter Fine

## President, CEO



David Bixby SVP General Counsel



Kathy Bollinger EVP Academic Delivery



Ron Bunnell EVP Chief Admin Officer



Naomi Cramer SVP Chief HR Officer



Dennis Dahlen SVP Chief Fin Officer



John Hensing EVP Chief Med Officer



Becky Kuhn EVP Comm Delivery



Chuck Lehn EVP Strategic Growth



Alex Morehouse SVP Chief Mktg Officer



Ryan Smith SVP Chief Info Officer



## Becky Kuhn

EVP, Community Delivery



Dave Caspers

VP Patient Experience



Jim Ferando

President Western Div



Rob Gould

President AZ West Div



Mystie Johnson Foote

CEO BMG



Pam Nenaber

CEO Pharmacy Services



Lynn Rosenbach

CEO BHC



Joan Thiel

VP OPS AZ

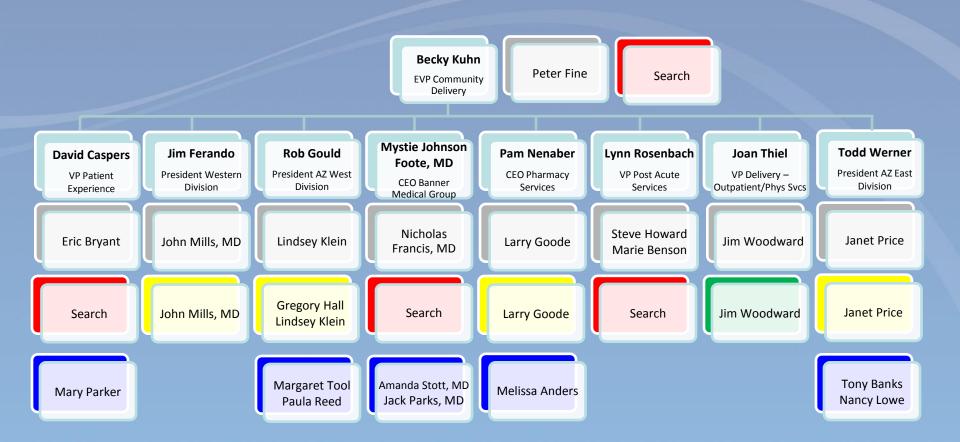


Todd Werner

President AZ East Div

## **2016 Community Delivery Succession Chart**











Ready 1-2 years

Search

Ready 2-4 years

## **Successor/Emerging Leaders**





Tony Clarke, Michelle Gardner, Garrett Hallis, Crystal Jones, Tracy Peters, Josh Poling, Amanda Skepling, Joshua Wagner

Tracy Peters, Josh Poling

Michael Banks, Tony Clarke, Crystal Jones, Amanda Skepling, Joshua Wagner

Michelle Gardner, Janet Goodwin, Garret Hallis, Lucy Henderson, David Pine, Grant Potter, Margaret Thomas





LEGEND

Interim

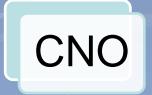
**Ready Now** 

Ready 1-2 Years

Ready 2-4 Years

## **Successor/Emerging Leaders**





Jason Carter, Barbara Caston, Allison Frantz, Angela Grant, Laurina Gomez, Tiffany Harrison, Susan Jenkins, Erika Johnson, Sandy Marks, Darren McKendry, Shelley Parker, Raul Penz, Claudia Sanchez, Kelly Schaefer, Jennifer Thompson, Brett Walker

Hailey Brooks, Barbara Caston, David Edison, Tiffany Harrison, Angela Grant, Sandy Marks, Darren McKendry, Jennifer Thompson, Kathleen Wrender

Ellen Artis, Jason Carter, Erika Johnson, Marianne Largo, Susana Lopes, Jocelyn Rogers, Claudia Sanchez, Julia Segovia

Angie Barnes, Heather Castro, Stephanie Davis, Allison Frantz, Laurina Gomez, Marcela Grotech, Sue Jenkins, James Makinney, Karla Shores, Lisa Taylor, Brett Walker





**LEGEND** 

Interim

**Ready Now** 

Ready 1-2 Years

Ready 2-4 Years



## **Leadership Development**

### **Strategy**

- Aligned with competencies/Behaviors
- Matched to needs of each role what info is needed, modality, when needed
- Leaders as Teachers
  - Builds network of facilitators leaders learning from other leaders

### **Leadership Academy**

- Courses (virtual & in-person) taught on variety of topics to support leadership growth and development
  - e.g., Trust, Courageous Conversations,
     Accountability, Generational Differences,
     Executive Presence

### **Highlighted Programs**

- Advanced Leadership Program
  - Rigorous high potential program to develop future Executives & Physician Leaders (85% promotion rate)
- Communities of Practice
  - Targeted learning (blend of leadership & coaching principles) for leaders scoring low on measure of Leadership Effectiveness. Last cohort had 150 leaders with 1,750+ direct reports. Resulted in change in behavior, increased engagement, increased productivity, and better budget management.
- Coaching
  - Available to all leaders in support of growth and development for themselves, their teams, and organization. Banner received 2012 Prism Award (from International Coach Federation) for excellence in coaching. To-date, approximately 350 individual leaders have engaged in 1:1 coaching.





Day Five

**Interruptions** 

## **New Leader Experience**

- Expectation for all new leaders and those hired into leadership at Banner Health (occurs monthly)
- Purpose: communicate Banner's expectations for new leaders and provide a robust learning opportunity of critical leadership skills and Banner's strategy and culture
- Combination of Banner-specific content, leader education, learning, and practical application
- Day 5 of content mimics "Day in the Life" of a leader through simulations
- Use of mentors (experienced and high-performing leaders) to evaluate role-play simulations and support new leaders for first 3-6 months on job
- Mentors receive additional education/training to support their own personal development

#### Day One Day Two Day Three Day Four Manage Your • Day in the Life Banner Culture Be Your Best Self Lead Your Team **Business** Simulation Banner Strategy Peer to Leader Situational Leadership • Plan, prioritize, Modules to Scenario Navigating the manage day Practice: Future Goal Setting Communicating as Staffing/Budgets a Leader Scheduling Process Analyze team member skill levels Conflict Creating a Optimize staff and support needs coaching culture Resolution • Entering the • Productive 1-1 Difficult schedule (Kronos) Competing conversations conversations Priorities - Measuring **Critical Thinking** Team Meetings productivity (WFA) • Peer to Leader Effective • Budget Rounding Managing



## 2016 Talent Management Focus

- Launch of Diversity & Inclusion Strategy to improve Representation and Retention.
- Build an Agile Workforce and Provide Tools in support of Employee of the Future.
  - Introduce new assessment that will enable us to "Hire for Attitude, Train for Excellence"
  - Develop workforce compensation strategy in alignment with Banner's operating model.
  - HR Transformation & Technology that will develop foundation capability for HR's strategic success and efficiency.
- Updated Banner Brand and Leadership Competencies to continue the evolution of Banner Health as an employer of choice
- Alignment of Talent Management, Culture, and Patient Experience strategies
- Enhanced focus on retention
  - 2016 Management Strategic Initiative
  - Entity goals for many entities (Acute & Ambulatory) for 2016 Performance Management