

# ASTHO *Connects*

A virtual learning series for public health leaders.

## Succession Planning

Part 3 of a 3-Part Series

October 2, 2025

# Speakers



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**Public Health Specialist**



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**Health Commissioner**



# Series Learning Objectives

- Distinguish succession planning from other types of planning
- Explain the value of succession planning in public health agencies
- Identify key roles and stages in the succession planning process
- Describe how to align the Core Competencies for Public Health Professionals to job descriptions and performance reviews

# Session #3 Learning Objectives



Explain how to walk-through a phased succession plan over a designated period



Describe how to align the Core Competencies for Public Health Professionals to positions and skill development



Describe how to align performance reviews to staff goal setting and training needs

There are several phases in Succession Planning.



# Phase 4: Strategy



Develop knowledge management strategies



Develop training, development and recruiting plans



Determine what metrics will be used to measure success



# Knowledge Management



## Capture Knowledge

Knowledge and work experiences from individuals in key positions



## Establish Procedures

Use this knowledge and those experiences to create procedures and trainings



## Continuity of Work

Utilize training plans and procedures to support ongoing work when positions are vacated



## Preserve and Retain

Establish a way to retain and centralized documentation for ease in distributing and updating the information

# Questions to Prompt Employees in Key Positions to think about Knowledge, Skills, Personal Experiences, and Lessons Learned

1. Is unique knowledge inherent to the success of this position? If so, please describe.
2. Does anyone else have this knowledge in the organization? If so, who?
3. How critical is it that this knowledge is documented and shared?
4. What are the critical ongoing projects for this position? Where is the associated documentation and status reporting kept?
5. Of the key meetings/committees/working groups you attend, which are the most critical for achieving success in your position?
6. What are some of the key issues and challenges faced in accomplishing the work?



October 2021

# Core Competencies for Public Health Professionals

Revised and Adopted by the Council on Linkages Between Academia and Public Health Practice:  
October 21, 2021

Available from: [phf.org/corecompetencies](https://phf.org/corecompetencies)

## ***Domains***

- Data Analytics and Assessment Skills
- Policy Development and Program Planning Skills
- Communication Skills
- Health Equity Skills
- Community Partnership Skills
- Public Health Sciences Skills
- Management and Finance Skills
- Leadership and Systems Thinking Skills

# Function of a Public Health Nurse 2, according to the position description.

*Assists in the training of Public Health LPN and Public Health Nurse 1.*

*Ensures continuation of operations of the department in the absence of the Director of Nursing.*



## **(Public Health Nurse 1)**

### Management and Finance Skills:

7.10. Applies critical thinking in decision making.

## **(Public Health Nurse 2)**

### Management and Finance Skills:

7.4. Engages in professional development.

7.7. Implements organizational policies, programs, and services to achieve diversity, equity, inclusion, and justice.

7.8. Manages programs and services.

7.10. Applies critical thinking in decision making.

## Core Competency Comparison

		LPN	PHN 1	PHN 2	DON
<b>Domain 7: Management and Finance Skills</b>					
7.1	Describes factors that affect the health of an organization				x
7.2	Secures human resources				x
7.3	Manages human resources	AGENCY-WIDE (7.3.7 and 7.3.8)			x
7.4	Engages in professional development			x	x
7.5	Secures financial resources				x
7.6	Manages financial resources				x
7.7	Implements organizational policies, programs, and services to achieve diversity, equity, inclusion and justice			x	x
7.8	Manages programs and services			x	x
7.9	Engages in contingency planning				x
7.10	Applies critical thinking in decision making	x	x	x	x
7.11	Engages individuals and teams to achieve program and organizational goals	AGENCY-WIDE (7.11.4)			x
7.12	Facilitates collaboration among individuals, groups, and organizations				x

# Annual Performance Reviews

- Make them useful for you
- Make them useful for the employee
- Integrate all systems to help employees understand the big picture of your organization
- Eliminate annual goals that are simply a reiteration of their expected job duties
- Include core competencies within the review
- If they are a member of the talent pool (on the succession bench) use annual goals to develop a new skill



# Performance Reviews

Below is an example of a small portion of a staff member's evaluation. You will note her supervisor mentioned a core competency within her review and then tied it together with a goal for the next evaluation period at the end of her review.

<b>Judgment/Decision Making:</b> Does employee weigh and evaluate information, prioritize tasks, assess probable consequences, and take appropriate action; demonstrate the ability to make sound and timely decisions and include appropriate people in the decision-making process and select alternatives that meet the objectives of the department and institution?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	As a coordinator, Jessica appropriately makes decisions while also seeking out guidance and feedback when situations require it. She takes initiative to problem solve or complete tasks without being asked. Another area for growth relative to succession planning is increasing Financial skills; learning about the relationship between finances, program structure and service delivery.*
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## New Goals for 2024:

1. Jessica will complete the HFA Implementation training or Peer Reviewer training. She will select 2 best practice standards and analyze HMG's adherence. She will develop and implement quality improvement goals for areas not meeting the threshold.
2. Jessica will attend 1 meeting per quarter with the HMG Director and Director of Finance to become familiar with the budget and make connections with service delivery.



# Policies and Training Guides

Title	Preview	Policy Area
Immunization Billing - Insurance Companies	... Click "OK" to THE FOLLOWING FILES ARE GENERATED SUCCESSFULLY Policy Owner: [REDACTED] Billing Clerk Policy Area: Fiscal Applies To: Billing Clerk Created 09/16/20 ..	Fiscal
Immunization Month End Reports - Billing Clerk	... send an email to the Fiscal Officer that everything is complete Policy Owner: [REDACTED] Director of Finance Policy Area: Fiscal Applies To: Billing ...	Fiscal
Receipt Policy and Procedures	... the Director of Finance's Office.) The immunization clerk will provide the Billing Clerk with receipt and documentation of fee for service payments. The B	Fiscal
Tricare Insurance Claims for Immunization Clinics	Purpose: To process Tricare Insurance claims for Immunization Clinics Reference: eClinicalWorks (eCW) Equipment: Computer Forms: HCFA 1500 FORMS Definitions: Processing Tricare Insura	Fiscal
Posting Insurance and Private Pay Payments in eClinicalWorks and Issuing Refunds	... alert to go the patient demographics and the "Billing Alert Tab" add billing notes and TimeStamp information and check the "Show Billing Alert" a	Fiscal

## Example of Position Specific Training Plan

Immunizations Billing	Trainer Initials	Employee Initials	Date Completed
Provided with user account information to access insurance web portals			
Reviewed administration of insurance web portals			
Reviewed contracts with Private Insurance, Medicaid and Medicare and revalidations			
Reviewed billing process for private, Medicaid, and Medicare for regular clinics			
Reviewed process for Billing Transact RX			
Reviewed process for Tricare Insurance Claims			
Reviewed billing for lice checks			
Reviewed billing process for private, Medicaid, and Medicare for flu clinics			
Revised billing for TB tests			
Reviewed billing process for private, Medicaid, and Medicare for mobile clinics, vaccinations on the go, homebound vaccinations, and back to school clinics			
Reviewed billing process for Traveler's vaccines			
Reviewed billing process for Back-to-School Clinics			
Reviewed immunization resources to look up questions, schedules, vaccine pricing, and CPT codes			
Reviewed process for secondary insurance billing			
Reviewed process for timely filing appeals			
Reviewed process for billing employer for employee vaccinations			
Reviewed process to verifying insurance prior to clinic day and verifying coverage			
Reviewed process for refunding and insurance company or a patient			

Example of Policy List in our Software

# Metrics

- Goal (s)
- How to measure your efforts



# Our Initial Strategies:

## 1. Knowledge Management

- Capture
- Use & Share
- House

## 2. Training Plans and Development Plans

## 3. Recruitment Plans – *External*

## 4. Best Practices



# Succession Planning and Management Best Practices

Best Practice	Our agency does this agency-wide	Our agency does this in parts of the agency, but not agency-wide	Our agency does not do this	Not sure of the extent to which my agency does this
<b><u>Pre-employment activities:</u></b>				
Q1 Our agency uses student internships and/or practicums as a means of identifying HP-HP for entry-level positions in our agency				
<b><u>Activities for selecting HP-HP</u></b>				
Q2 Our agency identifies HP-HP from our workforce				
Q3 Our agency assesses individuals for job competencies that are a level or more above their current position to help identify HP-HP				
Q4 Our agency assesses individuals for learning agility (an individual's readiness and ability to learn from experiences and be adaptive to changing environments)				
Q5 Our agency assesses individuals for problematic behaviors that may derail their career				
Q6 Our agency creates lists of individuals to be developed for higher level positions				



1. Student internships will be a means of identifying High Performing-High Potential individuals (HP-HP) for entry-level positions.
2. Our agency will identify HP-HP from our staff.
3. HCHD will assess individuals for job competencies that are a level or more above their current position.
4. HCHD will have a list of individuals to be developed for high level positions.
5. HCHD will identify cross-functional projects, task forces, or teams for HP-HP employees to serve specifically to develop their skills, knowledge, and ability (SKAs).
6. HCHD will purposively assign employees stretch assignments to develop their SKAs.
7. HCHD will create action-learning projects for HP-HP employees in which teams of people work on a project strategic to the agency's development and then have them formally report on the project to leadership.
8. HP-HP are encouraged to lead training sessions for development.
9. Formal meetings with HP-HP are used to define and further develop their job descriptions specifically to create developmental opportunities to help prepare them for new positions in the agency.
10. HP-HP employee and supervisor dialogues are used to set performance goals specific to their development for new roles/jobs.
11. HP-HP employee performance is evaluated against their development plan, put in writing, and verbally discussed.
12. HCHD limits some or all recruitments to internal applicants only, specifically to help retain HP-HP employees and then may or may not open recruitment to external applicants.
13. New lateral-level positions will sometimes be created to give HP-HP employees the opportunity to gain new experience or to retain the employee.
14. New higher-level positions will sometimes be created to give HP-HP employees the opportunity to promote within the agency or as a tool to retain a HP-HP employee.
15. HCHD increases HP-HP employee pay specifically to retain the employee, to prevent them from looking elsewhere or decline outside offers.



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Strategic Priority 1 – Workforce Development				
Goal – Cultivate a culture of innovation, leadership and collaboration through continuous learning, professional development and recognition.				
Key Measure – We will measure the number of trainings offered and annual performance evaluations conducted.				
Objective	Action Steps	Timeline	Responsible Party	Status
Objective 1.1				
<b>Develop and expand opportunities to attract and retain employees who align with the core values of the department.</b>	1. Utilize workforce development plan and revise as needed.	Ongoing	Management and Public Health Specialist	
	2. Review and update agency compensation plan.	October 2027 – June 2028	Health Commissioner	
	3. Complete the department's succession planning implementation.	December 2024	Public Health Specialist	
	4. Conduct an employee satisfaction survey to assess employee morale.	August 2024 and August 2026	Human Resources	
	5. Expand internship program.	December 2024 - December 2025	Human Resources	

*HCHD will identify cross-functional projects, task forces, or teams for HP-HP employees to serve specifically to develop their skills, knowledge, and ability (SKAs).*

*HCHD will create action-learning projects for HP-HP employees in which teams of people work on a project strategic to the agency's development and then have them formally report on the project to leadership.*

Strategic Priority 1 – Workforce Development				
Goal – Cultivate a culture of innovation, leadership and collaboration through continuous learning, professional development and recognition.				
Objective	Action Steps	Timeline	Responsible Party	Status
Objective 1.2				
<b>Provide training programs for continuous learning and professional development.</b>	1. A Public Health 101 training provided semiannually to all new hires to increase knowledge of the foundations of public health.	Beginning in 2024	Human Resources	
	2. Expand health equity training beyond existing curriculum.	August 2024 - August 2025	Health Commissioner	
	3. Develop training plan for all positions.	January 2024 - June 2025	Management	
	4. Formalize professional development policy for association membership and conference attendance.	January 2026	Health Commissioner and Human Resources	
Objective 1.3				
<b>Increase engagement with, and innovation of, employees by recognition and reward.</b>	1. Maintain wellness program for employees with the goal of improving physical and mental health.	January 2024 – December 2028	Public Health Specialist and Human Resources (2025)	
	2. Develop "Think Tank" program that encourages participation and rewards employees for innovative ideas.	November 2024	Health Commissioner	



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# Phase 5: Implementation



Document the Succession Planning Phases into a Comprehensive, Formal Succession Plan



Manage the Implementation of the Succession Strategies



# Phase 6: Evaluation



Collect, Measure, Communicate, Adjust

# Our Initial Strategies:

## 1. Knowledge Management

- Capture
- Use & Share
- House

## 2. Training Plans and Development Plans

## 3. Recruitment Plans – *External*

## 4. Best Practices



# 2025 Best Practices

1. *Student internships will be a means of identifying High Performing-High Potential individuals (HP-HP) for entry-level positions.*
2. *HCHD will identify cross-functional projects, task forces, or teams for HP-HP employees to serve specifically to develop their skills, knowledge, and ability (SKAs)*
3. *HCHD will send HP-HP employees to technical and/or management/leadership trainings.*
4. *HCHD will create individual development plans with HP-HP employees specific to their preparation for new positions in the agency.*
5. *HCHD will give HP-HP employees exposure to general organizational management (as opposed to program management).*
6. *HCHD will create and deliver internal workshops and courses specifically for HP-HP employees.*
7. *HCHD will encourage development by having HP-HP lead training sessions.*
8. *Formal meetings with HP-HP will be used to define and further develop their job descriptions specifically to create developmental opportunities to help prepare them for new positions in the agency.*



# 2025 Goals



**GOAL:** Add depth to the succession bench

**METRIC:** The number of key positions with two or more HP-HP employees on the bench

**GOAL:** Increase the mastery of core competencies by HP-HP employees in the talent pool

**METRIC:** The percentage of competencies mastered at the time of being placed in the talent pool in 2025 and in 2027

**GOAL:** HP-HP staff in the talent pool will serve as trainers

**METRIC:** The number who have led a training at the time of being placed in the talent pool in 2025 and the number of trainings held through 2027, both collectively by the talent pool, as well as individually in the talent pool.

# Staff Survey 2025

**What do you see as your role in the health department in the next year?**

**What skills do you need to achieve that?**

*Please consider the domain areas of the Core Competencies for Public Health Professionals when answering. These include:*

## ***Domains***

- Data Analytics and Assessment Skills
- Policy Development and Program Planning Skills
- Communication Skills
- Health Equity Skills
- Community Partnership Skills
- Public Health Sciences Skills
- Management and Finance Skills
- Leadership and Systems Thinking Skills



# Development ACTION PLAN

## Succession Plan 2025

Date:



Candidate Name:

Key Position(s):

Current Position:

Top Developmental Areas				
1.		4.		
2.		5.		
3.		6.		
Development Actions				
Timeline Zone (Expectation)	Development Area (Competency; SKA; Best Practice; Procedure, etc.)	Action Step(s) (How We're Going to Do It)	Timeline (expectation for completion)	Progress/Comments (What was done; barriers; successes)
12 months				
A				
B				
C				

1 - 3 years				
<i>A</i>				
<i>B</i>				
<i>C</i>				
3 - 5 years				
<i>A</i>				
<i>B</i>				
<i>C</i>				

\_\_\_\_\_  
Employee Signature and date

\_\_\_\_\_  
Supervisor Signature and date

NOTES:



# You Got This!



**DON'T WORRY TOO  
MUCH ABOUT HOW  
YOU ARE GOING TO  
GET IT ALL DONE.  
GET STARTED,  
LEARN AS YOU  
GO, AND IT WILL  
ALL COME TO YOU.  
ACTION CREATES  
MOMENTUM, AND  
MOMENTUM  
ENERGIZES YOU TO  
KEEP GOING**

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# TELL US WHAT YOU THINK >>

**Help ASTHO evaluate  
Succession Planning Part 3  
by filling out the evaluation  
generated by Zoom!**

<https://bit.ly/4gCo7k8>



**Scan the QR code to  
complete the  
evaluation!**