ASTHOConnects

A virtual learning series for public health leaders.

Succession Planning

Part 1 of a 3-Part Series

September 4, 2025



Speakers



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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 #1 Learning Objectives

- Define succession planning
- Explain why succession planning is crucial for an agency's short- and long- term effective operations
- Identify key roles and responsibilities of those on your succession planning team



There are several phases in Succession Planning.





Phase 1: Preparation



Get to Know Succession Planning



Build Your Succession Planning Team



Prepare Your Team



1. Does your organization do succession planning?

- A. Yes, with a standardized process
- B. Yes, but I don't know the process
- C. No
- D. I don't know



2. Do you have experience creating a succession plan?

- A. Yes
- B. No
- C. Yes but I still don't really understand it





Succession Planning Polls



What prevents you from implementing a succession plan?





Barriers to Succession Planning



- Low priority
- Lack resources
- Lack of understanding
- Delay in results
- Civil service and/or collective bargaining



WHY Do Succession Planning?

- Provides a roadmap to ensure business continuity
 - Even with potential personnel changes
- Creates a process of identifying and developing interval talent to fill critical roles when vacancies occur
- Preserves critical, often org-specific knowledge
- Develops Skills, Knowledge, Abilities (SKAs) to be prepared
- Pool of potential candidates
- Talent-focused
- Retain & Recruit valuable employees





WHY Do Succession Planning?

- Community Partners retain trust when we retain knowledge
- Motivates employees to expand skills via development opportunities
 - > Creates engagement
 - > Creates culture of growth & opportunity
- Saves on recruitment costs & minimizes delays
- Leaves a legacy
 - What do you want others to carry forward (agency; individual)
- Works in conjunction with the Continuity of Operations Plan (COOP)
- Secures new, fresh talent





What Succession Planning Is and Is Not

- Is **NOT** simply identifying someone with promotion potential to fill a vacant position when it occurs
- . Is a process that ensures two things:

1. Organizational talent needs are identified and aligned with strategy and objectives

2. Key positions are identified, and a pipeline of new leaders is developed

Succession planning is a systematic method for preparing future leaders and mission critical practitioners to compete for positions as they become available.



Replacement Planning:

- Identifies short-term or long-term backups.
- Incumbents have the base skill set but are not necessarily developed to understand the new working environment or to smoothly transition into the new responsibilities.
- Focuses on emergency replacements.
- Works under the assumption that the structure of the organization will not change.
- Typically, there are two or three "replacements" identified in the organization.



Succession Planning:

- Identifies leadership or mission critical roles, determining the required knowledge, skills, abilities, and competencies required in correlation to the strategic goals of the organization.
- Considers data and trends that affect turnover and retention.
- Provides a development program for identified talent with the desire for the next roles, as well as the aptitude to grasp the new information/knowledge required.



The Cost of Not Engaging in Succession Planning

Ask these questions about your organization:



How much does it cost to hire a replacement for a key position?



What is the cost of loss productivity?



How do these costs and losses affect your remaining employees?



How much time will it take to fill the position?



Organizational Benefits

- Provides structure for skills development/training
- Stabilizes performance
- Ensures continuity of leadership
- Develops pipeline of skilled workers
- Enhances knowledge transfer
- Makes "employer of choice" gets you the better workers
- Employee engagement/loyalty/commitment
- Reduced costs
- Helps ensure long-term health, growth and stability
- Minimizes disruption during change (business continuity)

Employee Benefits

- Improved communication and morale
- Improved effectiveness
- Personal/professional development path

Community and Partner Benefits

- Improved reliability
- Improved staff knowledge
- More efficient service
- Increased staff responsiveness/pride



SIGMASuccession

Are you engaging in succession planning?



Are you truly engaging in strategic and sustainable long-term planning, or just pursuing a quick fix? While approaches to succession planning vary, they tend to

Planning	Decision Making	Your Sco	ore	0	Reset
Do you know who will replace each position on your senior management team? Do you know who will fill the vacancies left by those who move into leadership roles? Do you prepare candidates for their new position with job shadowing or in-role training before they are promoted? Do you have options of candidates to choose from when a role becomes available? Are your candidates aware of their status as high-potentials?	Are succession candidates evaluated for readiness based on the role requirements of the focal position? Were these role requirements determined with objective assessments? Are candidates chosen on factors outside of their similarity to the current role incumbent? Do you involve multiple stakeholders in the candidate selection process? Do you use validated assessment tools to ensure the right candidates are considered for the right role?	7-13	planning term for Demons improve Conside compan strategic planning Mature adjustm	ment hent suce g to add cus strates ement er how en to c in its en plan whents re	cession opt a long- need for your oe more succession with few equired
Integration Do you hire with leadership or promotion potential	Success		Focus or develop term su	ing pla	er n for long-
in mind? Is in-house training available for your employees to ensure candidates are developed over time? Does your organization offer a budget for external training opportunities? Are leaders encouraged to initiate conversations with staff about their career aspirations? Do you provide high-potentials and succession candidates with regular opportunities for growth, such as stretch assignments, added responsibilities, or	Do your employees show growth and skill development during their tenure with your organization? Are you able to find suitable candidates from within the organization? Does the person chosen for the role reflect the long-term goals and planning for the organization? When a role becomes available, is a candidate ready	and the second second	Our Suceries take our time ensive for ntation of your	ccession ces only e, and co full-yea plan for execut	n Planning y two half- delivers a r r each

to take it on immediately?



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promotions, to retain their interest and engagement?

Creating your team

- Health Commissioner
- Director of Nursing; Fiscal lead
- Senior Management
- Department Heads, Managers various levels
- Human Resources if applicable
- Outgoing incumbent and/or their direct manager
- Long-term employees
- Subject Matter Expert (SME) guides team through the process



The SP Team will devise, implement, and manage the plan; they will drive staff buy-in and foster engagement.



- Create organizational/unit chart.
- Create a timeline of retirement eligibility for key positions.
- Consider questions such as:
 - When do you expect them to leave?
 - Where do you expect to get replacements?
 - Are replacements abundant and readily available? If not, where will they come from?
- Identify those who are possible successors and discuss how they will be developed to compete.
- If feasible, work with HR to identify and build a relationship with successors.



Phase 2: Alignment



Understand the Strategic Plan and Workforce Development Plan



Develop the Business Case



Determine the Budget for Succession Planning Strategies









Build and support a diverse and skilled public health workforce.

- Maintain competent workforce
- Meet public health needs
- Trained in diverse areas
 - Epidemiology
 - Health Education
 - Population Health
 - Public Health Nursing
 - Environmental Health
 - Public Health Administration









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
Objective 1.1	
Develop and expand opportunities to attract and retain employees who align	Utilize workforce development plan and revise as needed.
with the core values of the department.	Review and update agency compensation plan.
	Complete the department's succession planning implementation.
	4. Conduct an employee satisfaction survey to assess employee morale.
	5. Expand internship program.

Objective 1.2	
Provide training	1. A Public Health 101
programs for continuous	training provided
earning and	semiannually to all new
professional	hires to increase
development.	knowledge of the
	foundations of public
	health.
	2. Expand health
	equity training beyond
	existing curriculum.
	3. Develop training
	plan for all positions.
	4. Formalize
	professional
	development policy for
	association
	membership and
	conference attendance.



Objective 1.3	
Increase engagement with, and innovation of, employees by recognition and reward.	Maintain wellness program for employees with the goal of improving physical and mental health.
	2. Develop "Think Tank" program that encourages participation and rewards employees for innovative ideas.



Strategic Priority - 2 - Community Engagement

Goal – Ensure meaningful presence in the community by communicating public health messages through media, community events, coalitions, and partnerships to increase service utilization.

Key Measure - We will evaluate the program participation numbers and quantity of communication engagements each year.

	Objective 2.4	
Objective	Implement the new mobile unit to serve community. Action Steps	and safety protocols for mobile unit. 2. Investigate ways to serve the community
Objective 2.3		with mobile unit and
Investigate options to make programs more accessible to residents.	1. Evaluate the health department office in the areas of mobility, language services and access in all areas of the building. 2. Investigate new ways to serve the homebound in the community.	draft menu of services. 3. Secure locations where mobile unit can be placed to provide services and keep master list. 4. Obtained signed MOUs with partners to provide most needed services.



Strategic Priority 3 – Fiscal Viability

Goal – Maintain fiscal stability to enhance capacity to respond to emerging health challenges, and foster community well-being.

Key Measure: Annual revenue optimized and increased financial literacy of staff

Objective 3.4
Develop handbooks and
training to increase
financial literacy of staff.

1. Develop agency
fiscal handbook.

Objective	Action Steps
Objective 3.1	
Maintain department budgets to ensure the	Hold meetings with department heads to
stability of the overall Health Department's	maintain communication and adjust budgets as
budget.	necessary.
	Present financial education information at

staff meetings (2x/year).



Questions





 What skills are necessary to ensure your organization's successful performance?

 What challenges or weaknesses is your organization facing that succession planning may help to address?

How will succession planning benefit your organization?





What skills are necessary to ensure your organization's successful performance?





What challenges or weaknesses is your organization facing that succession planning may help to address?





How will succession planning benefit your organization?



Competencies/Skills







- Succession planning starts with the requirements of the position at the skill level.
- Have a potential mindset when hiring and work to develop those who are willing to grow.



Council on Linkages Between Academia and Public Health Practice (Council on Linkages)

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

Tiers

- Tier 1: Front Line and Program Support
- Tier 2: Program Management and Supervisory
- Tier 3: Senior Management and Executive Leadership

http://www.phf.org/corecompetencies





COGNITIVE

Analytical Orientation **Business Acumen** Creativity Decisiveness Objectivity Prioritizing Risk Taking Technical Orientation Thoroughness



INTERPERSONAL LEADERSHIP SKILLS

Active Listening Client/Customer Focus Communication Conflict Management First Impression Formal Presentation Interpersonal Relations Negotiation Operating Upwards Persuasiveness Sensitivity Social Astuteness



PERSONAL LEADERSHIP QUALITIES

Achievement and Motivation Ambition Dependability Desire to Learn **Emotional Control** Flexibility Independence Integrity Open-Mindedness Productivity Self-Discipline Self-Esteem Valuing Diversity Work/Life Balance



SENIOR LEADERSHIP SKILLS

Assuming Responsibility Attracting Staff Delegation Developing/Coaching Others **Emphasizing Excellence** Facilitating Teamwork Inspirational Role Model Involving Direct Reports Monitoring and Controlling **Motivating Others** Organizational Spokesperson Organizing the Work of Others Short-Term Planning Strategic Planning Vision





Develop the Business Case

- Strategic goals?
- Workforce planning strategies?
- Can you articulate a link between strategic goals and succession planning? Workforce and succession planning?
- Describe benefits?
- Data to support the work?
- What are the succession planning goals?



Example of a Business Case

A strategic goal of our health department is workforce development. Ensuring the health department can carry out its mission we must take into consideration that we are at risk of losing a great deal of institutional knowledge, as 70% of management and 45% of staff are eligible for retirement within the next 3-5 years.

It is vital that we identify potential skill gaps and be able to fill those gaps. Hiring new employees with experience, education and knowledge as well as implementing a program to further develop current staff with the skills, knowledge and ability to perform those duties are critical for our agency's continued success.



Goals of Succession Planning



- To promote seamless staff transitions
- To preserve legacy of achievements and experiences
- To focus planning on critical vulnerabilities in the workplace
- To build pools of talent capable of competing for essential positions
- To encourage employee engagement, collaboration, and mentorship





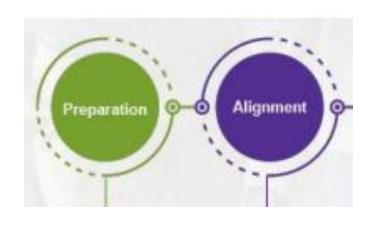
Determining the Budget

- Dual salaries
- Today's salaries
- Hiring costs
- Training costs
- Shifting duties





Overview and Next Steps



- Organizational Chart
- Retirements
- Team considerations
- Strategic Plan
- Workforce Development Plan
- Draft your succession plan goals

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