

# Leadership Transition Guide

The Leadership Transition Guide features four activities designed to support transition planning, refine position descriptions, and optimize the talent search in collaboration with your Human Resources (HR) Department, Board of Health, County Manager, and/or state-wide colleagues.

**To navigate to an activity, click on the activity title below.**

ACTIVITY	DESCRIPTION
<a href="#">Activity One</a>	Share your career trajectory including transition considerations and future plans.
<a href="#">Activity Two</a>	Summarize aspects of your role such as responsibilities, duties, and projects. Define how your role may evolve in the future.
<a href="#">Activity Three</a>	Document needed skills, experiences, and trainings for your position. Articulate your previous roles to highlight career progression options to assume your current role.
<a href="#">Activity Four</a>	Define pool of potential candidates (roles, not individuals) with skills and abilities needed to fill your role. Define gaps in the talent pool and share development and training strategies.

**Before starting your activities, please complete the following two items.**

**Please work with your HR/administrative staff to locate your Position Description (PD) and/or Functional Role Description (FRD). Then as needed, share those documents with the Board of Health, County Manager, and/or state-wide colleagues supporting the PD/FRD update and transition planning.**

**Please type “Complete” in the field below to confirm you have sent your PD/FRD and include any additional details as needed.**

**Sample Response:** Complete. My PD is outdated, so additional details are as follows: Oversee all supervisory and management staff; translate the organization’s mission and vision into strategy, goals, and objectives; coordinate with peers and other leaders across the agency; communicate to department leadership and between offices and branches within the division.

*Insert response here*

**Please share your CV/resume with individuals supporting the PD/FRD update and transition planning.**

**Please type “Complete” in the field below to confirm that you have shared your CV/Resume.**

**Sample Response:** Complete.

*Insert response here*

# 1

## Activity One

### Define Your Future Trajectory

#### OVERVIEW

In Activity One, you are asked to provide information that would enable workforce continuity planning for your position. In this activity, you will share information on your career trajectory (e.g., retirement timeframe, departure considerations, future growth opportunities) and related strategies.

**Estimated Time to Complete:** ~30 minutes

#### SEGMENT ONE

Questions in segment one focus on cataloging tactical information related to your role.

**1. Have you thought about retirement or communicated your departure plans to anyone?**

**Sample Response:** No, I have not. I'm not planning to retire anytime soon; however, I will be retirement eligible in two years. At that point, I may consider my retirement date and begin communicating my retirement plan.

*Insert response here*

**2. Please identify any organizational circumstances, such as department-specific factors, that should be considered while planning your future career trajectory?**

**Sample Response:** I'm the health department's administrator and will be retiring next year. In two years, my supervisor, the Director, will retire. This change implies that employees may experience significant leadership changes within a short time. Therefore, we must devise specific transition strategies to guarantee a seamless handover of responsibilities and instill employee confidence in the new leaders who will take charge.

*Insert response here*

## SEGMENT TWO

Questions in segment two are reflective in nature and may require additional time.

**1. In an ideal state, how would you transition out of your role when you retire or depart?**

**Sample Response:** Ideally, my successor would shadow me for 6-months prior to my departure. My successor is more likely to be successful if they have ample time to serve in the role while I'm still available to mentor them through the complex, multi-faceted nature of the position. It would also give us the opportunity to have knowledge transfer sessions where I can share lessons learned.

*Insert response here*

**2. If you have thought about retirement/departure, what strategies (e.g., HR mechanisms) would you recommend for backfilling your position? Examples include internal hire or external hire from other local health departments.**

**Sample Response:** Hiring from other local health departments would be ideal so that the individual is already familiar with the roles and responsibilities of the position. This would enable them to jump into the position and focus on developing relationships with staff and community partners.

*Insert response here*

# 2

## Activity Two

### Outline Role Summary & Evolution

#### OVERVIEW

In Activity 2 you will focus on summarizing critical aspects of your role including documenting areas/programs you oversee and core competencies required for your role. You will also be prompted to define how the role may evolve over the next 5-10 years to prepare for change.

***Estimated Time to Complete:*** ~45 minutes

#### SEGMENT ONE

Questions in segment one focus on cataloging tactical information related to your role.

<b>1. What programs, projects, and activities do you provide strategic oversight or direction?</b>
<b>Sample Response:</b> In this role, I oversee prevention and evaluation strategies and lead program coordination efforts, such as establishing important partnerships with community-based organizations and state and local health departments. <i>Insert response here</i>
<b>2. What are the 5-6 key competencies needed for your role?</b>
<b>Sample Response:</b> The top 5-6 key competencies needed for my role are: <ul style="list-style-type: none"><li>• Strategic Thinking: Ability to develop both short and long-term strategies.</li><li>• Organizational Vision: Ability to develop, articulate, and implement a vision that leads the organization towards its mission.</li><li>• External Awareness: Ability to identify and integrate key external factors into daily work activities based on the environment.</li><li>• Political Savvy: Ability to understand and utilize the dynamics of the organization and decision-making to achieve objectives.</li></ul> <i>Insert response here</i>
<b>3. What are the expectations of your role? What are key performance elements for your role?</b>
<b>Sample Response:</b> As an Administrator, I have a key role in setting objectives and formulating a broad vision, goals, and policies. I am expected to provide overall management to staff and the department, as well as act as the technical expert for budgeting and policies. My performance elements include: 1) Promoting high performance by encouraging employee development activities, balancing workloads, supporting stretch goals, and rewarding high performance in accordance with policies; and 2) Providing advice and guidance to staff in a complete, consistent manner. <i>Insert response here</i>

## SEGMENT TWO

Questions in segment two are reflective in nature and may require greater dedication of time.

<b>1. Think about when you first stepped into this role. What did it look like then versus now?</b>
<p><b>Sample Response:</b> When I first started, we partnered with 5 organizations, and now we partner with 10. This resulted in a need for greater strategic coordination, which impacts how I lead.</p> <p><i>Insert response here</i></p>
<b>2. How do you expect the role to change in the next 5-10 years?</b>
<p><b>Sample Response:</b> My role continuously evolves as the public health landscape evolves. For example, increased exposure to health equity principles helped me guide staff as they engaged community-based organizations that support historically underserved populations. These trusted community partners were able to help us deliver public health messaging in a culturally appropriate manner. Technology will have major impacts on my role and on the health department as a whole. Technology may reduce workloads, but staff must increase data literacy and become more tech-savvy, even at the highest leadership level.</p> <p><i>Insert response here</i></p>
<b>3. Thinking about how your role may change, what competencies and knowledge will a future individual need to be successful?</b>
<p><b>Sample Response:</b> They will need to be able to foster inclusivity within the workforce, among partners, and within the community. A competency that can lead to success in my role is leveraging and fostering diversity. We're more likely to achieve the organization's vision and mission if we foster an inclusive workplace where diversity and individual differences are valued and leveraged.</p> <p><i>Insert response here</i></p>

# 3

## Activity Three

### Document Developmental Needs & Career Pathway

#### OVERVIEW

Activity Three focuses on your skills, experiences, and trainings that enabled your success in this role. The activity will prompt you to document critical technical and leadership skills, trainings, and certifications for the role. You will also be prompted to respond to questions regarding your career journey and your progression to this role.

***Estimated Time to Complete:*** ~1 hour

#### SEGMENT ONE

Questions in segment one focus on cataloging tactical information related to your role.

<b>1. What technical skills must an individual possess prior to assuming this role? It may be helpful to reflect on technical skills you possessed prior to assuming this position.</b>
<p><b>Sample Response:</b> The main technical skill that prepared me for this role is data acumen. My role requires me to review data-driven outcomes of public health research. My strong data acumen helps me interpret the results, understand the implications for our broader portfolio of work, and determine its relationship to the health department's mission.</p> <p><i>Insert response here</i></p>
<b>2. What leadership skills did you need to possess before assuming this role, and which were the most critical? It may be helpful to reflect on leadership skills you possessed prior to assuming this position.</b>
<p><b>Sample Response:</b> Critical leadership skills that prepared me for my role and enabled my success included integrity, active listening and public speaking, relationship building, and problem-solving.</p> <p><i>Insert response here</i></p>
<b>3. What technical and leadership skills have you learned since assuming this role (i.e., skills you have acquired or honed since being in the role)?</b>
<p><b>Sample Response:</b> Throughout my tenure, I've honed my interpersonal relationship-building skills. My role requires building partnerships with a multitude of stakeholders, so cultivating relationships, creating, and facilitating partnerships across organizations, and managing conflict have been critical for success.</p> <p><i>Insert response here</i></p>
<b>4. What specialized knowledge or experiences do you believe individuals should have prior to assuming the role?</b>

**Sample Response:** My position is responsible for reviewing resources distributed to community partners, regional organizers, and non-profit groups with evidence-based practices. To be successful in the role, individuals must have subject matter expertise and experience reviewing and editing scientific manuscripts, reports, and evidence-based programmatic tools and resources.

*Insert response here*

**5. What specific training, conferences, or certifications would help an individual be effective in your role?**

**Sample Response:** I recommend they attend trainings on building partnerships and being an effective manager and leader. The Council of State and Territorial Epidemiologists (CSTE) Annual Conference would also help them connect with peers and learn about innovations in data science and modernization.

*Insert response here*

**6. Please provide information about any growth or professional opportunities relevant to your role?**

**Sample Response:** I would recommend the following professional opportunities: Executive coaching, health equity training, and training on how to promote a positive workplace environment.

*Insert response here*

## SEGMENT TWO

Questions in segment two are reflective in nature and may require greater dedication of time.

<b>1. What experiences helped you develop most as a leader?</b>
<p><b>Sample Response:</b> I was selected as an intern early in my career. As an intern, I served in rotations across departments while practicing leadership behaviors and skills as I worked through real-time challenges with local public health leadership.</p> <p><i>Insert response here</i></p>
<b>2. What experiences and/or trainings would have made you a more effective leader?</b>
<p><b>Sample Response:</b> I would have been able to better advocate for others and encourage authenticity if I had received training on diversity, equity, and inclusion, and health equity earlier in my career.</p> <p><i>Insert response here</i></p>
<b>3. When reflecting on your career progression/pathway, is there anything you wish you had done differently or experiences you wish you had before assuming your position?</b>
<p><b>Sample Response:</b> When reflecting, I realize that my experience could have been bolstered by taking a short-term role to work in a different setting. Working in the non-profit or private sector would have enhanced my strategic thinking, problem-solving, and partnership development skills and given me a unique perspective when facing challenges in my work.</p> <p><i>Insert response here</i></p>
<b>4. Based on the needs for your role (e.g., skills, experiences) what entry level, mid-level, and next-in-line level roles may lead an individual to your role?</b>
<p><b>Sample Response:</b> Entry level roles include public health coordinators/associates and administration associates in public or non-profit organizations. Mid-level roles include public health or health non-profit managers, or team leads with management functions. Next-in-line roles include administrative officers or deputy management officials.</p> <p><i>Insert response here</i></p>



# 4

## Activity Four

### Identify The Talent Pool

#### OVERVIEW

Activity Four will ask you to think through a pool of potential roles (not individuals), who could acquire the skills, abilities, or experiences needed to eventually fill this role. The activity will also prompt you to think through suggested developmental activities for the talent pool, and to define gaps such as hard to find skillsets or hiring challenges.

***Estimated Time to Complete:*** ~45 minutes

#### SEGMENT ONE

Questions in segment one focus on cataloging tactical information related to your role.

<b>1. Do you know of staff who are interested in a leadership position (no names please)? Please provide a clear <u>yes or no</u>, and feel free to add additional context.</b>
<p><b>Sample Response:</b> I hold 1-1 meetings regularly with the junior staff in my health department. During those meetings, I ask about their professional goals and aspirations, which helps me understand their interest in eventually assuming a leadership position. There are 3 individuals who I am aware of who are interested in eventually holding a leadership position.</p> <p><i>Insert response here</i></p>
<b>2. Are there staff you are aware of who are ready to assume your role now (no names please)? Please provide a clear <u>yes or no</u>, and feel free to add additional context.</b>
<p><b>Sample Response:</b> No, there are not any staff who are fully prepared and ready to assume my role.</p> <p><i>Insert response here</i></p>
<b>3. Are there staff you are aware of who may be ready to assume your role in 2-3 years (no names please)? Please provide a clear <u>yes or no</u>, and feel free to add additional context.</b>
<p><b>Sample Response:</b> Yes, there are 3 staff who I am aware of who may be ready to assume my role in 2-3 years. Two of these staff members have expressed interest in a leadership position. In terms of developmental needs, rotations into leadership positions across the department would be a great experience to help these individuals become more comfortable collaborating across the agency. Other development areas include executive communication, presence, and political savviness.</p> <p><i>Insert response here</i></p>

**4. Are there potential candidates (no names please) who could temporarily backfill your position in circumstances such as short- or long-term leave? Please clearly list the roles of potential candidates.**

**Sample Response:** Yes, four potential candidates could fill my role on a short-term basis. All four potential candidates are senior staff members. I previously rotated temporary details and promotions across those individuals when I was on extended leave. Developmental needs include building people management skills and enhancing skills related to developing and maintaining external partnerships.

*Insert response here*

## SEGMENT TWO

Questions in segment two are reflective in nature and may require greater dedication of time.

**1. What challenges will make it difficult to fill your role? Examples may include hiring challenges, hard to find skillsets, specific expertise, and lower salary than comparable positions in the area.**

**Sample Response:** The major challenge that may arise in eventually filling my role is offering a competitive salary and benefits package to attract top talent.

*Insert response here*

**2. Are there risks or challenges you generally face when trying to fill leadership roles in your health department?**

**Sample Response:** One of the main challenges is workload. I have a lot of talent in my health department who would be well-suited to fill leadership roles, but they are content with their workload and understand that if they move into a leadership position, demands will be greater and may be harder to balance.

*Insert response here*

**3. When it comes to eventually backfilling your role, what talent gaps exist among mid-level and next-in-line future leaders within your health department?**

**Sample Response:** The biggest gap is in technical skills. We need individuals with data science and technical skills who can employ automation techniques and create interactive dashboards with large data sets. We only have a very small group of staff with these capabilities, so we either need to hire externally or train more extensively to fill the need.

*Insert response here*

**4. What experiences or developmental opportunities would you recommend to fill these gaps?**

**Sample Response:** It'd be great if we had a rotation program for individuals to shadow the Data Science Team to learn these skill sets.

*Insert response here*