



SECURING OUR TOMORROWS

Clermont County Health Department Batavia, Ohio



Clermont County
Public Health
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Succession planning **identifies leadership or mission-critical roles**, therefore determining the knowledge, skills, abilities, and competencies required in correlation to the strategic goals of the organization. It is a **process** that ensures organizational talent needs are identified and aligned with strategy and objectives, key positions are identified, and a pipeline of new leaders is developed by taking into account **data and trends that affect turnover and retention** and providing a **development program** for identified talent with the desire and aptitude for the next role.

—Succession Planning Course Guidebook, [NACCHO University](#)

Overview

The [Clermont County Health Department](#) serves a population of approximately 20,000 residents in a rural Appalachian county in Batavia, Ohio. CCHD provides essential public health services with approximately 50 staff members in 5 divisions: Administration, Environmental Health, Nursing, Plumbing, and Water and Waste Division.

When Tara Jimison joined the health department as an epidemiologist in 2016, the department had already initiated discussions of needing more updated Standard Operating Guidelines (SOGs), which includes descriptions of a staff member's key job functions and how to perform them. When Tara was promoted to Director of Nursing in 2020 during the COVID-19 pandemic, she was handed a thick paper resource binder from the previous Director. However, she soon discovered the documents were outdated and didn't detail the full scope of her responsibilities. With the support of other supervisors, the health department undertook an organization-wide effort to modernize training plans that accurately detailed responsibilities for each position to improve onboarding and knowledge transfer upon a position's vacancy.



Actions Taken

- Critical positions and job duties were identified, resulting in the creation and updates of Continuity of Operations plans, plans for job duty tertiary coverage and professional development, relevant job descriptions (requirements, duties, competencies), and real-time training plans for each staff person.
- Supervisors developed training plans that are issued to every position across the entire agency as part of onboarding and updated as needed with managerial support.
- The health department transitioned from paper to electronic copies of training plans. The adaptation of an Excel template was created based on the needs identified and historically utilized with paper training documentation. Through the Plan, Do, Study, and Act cycles, Clermont County adapted the template to best meet the needs of staff.
- For each position, each employee and their supervisor reviewed and updated SOGs. Once staff achieved proficiency within their job duties by completing their training plan, it was their responsibility to maintain the plan as a living document.

“A review of best practices and available resources for succession planning was conducted through online review and reaching out to local health departments to understand current practices to maintain continuity of operations. Succession planning is a process that comprises multiple steps and moving parts. We reviewed the available information and highlighted critical pieces of succession planning. All staff are working on this related to the possibility of unforeseen circumstances of employment, extended leave, or termination. However, an agency can prioritize based on known upcoming extended leave or retirements.”



Challenges

- The health department recently experienced high staff turnover without notice or time to prepare for transition.
- Before undergoing this process, the health department was using outdated paper documents that weren't comprehensive or easy to edit.
- A residual sense of urgency from the COVID-19 pandemic still lingered.

Unique Resource Developed

Title: Electronic Training Plans

Description: A training plan that details the daily and weekly tasks and responsibilities for each role, along with a contact list of partners, to facilitate onboarding, to ensure staff coverage of essential activities, and to facilitate a transition when position is vacated. These training plans functioned as “living succession plans,” as a standardized reference point on how to conduct individual job duties and responsibilities.

Impact: The updated training plans improved onboarding of staff members and provided an easy reference to ensure structural support by identifying gaps and barriers in roles and responsibilities. By updating these training plans to be comprehensive and descriptive of day-to-day tasks, staff who transitioned into new positions felt more equipped to fulfill the responsibilities of their new role. Clermont County Public Health has also implemented cross-training for all program-critical tasks to ensure that there is coverage to serve in the respective areas.

Key Takeaways

- In order for your employee to succeed in their position, building the foundation during onboarding is key.
- Regardless of the format, your training plan should be a living document that can be edited, re-visited, and re-evaluated on a predetermined basis to ensure the most impact.
- Get comfortable with change and drafts not being perfect – “Finalize” the document even if you know it’ll need to be updated later!
- Get buy-in from other leadership/management positions. In this case, the seed of this effort was sowed in monthly management meetings and institutionalized through the collaboration of supervisors and managers across all levels and all departments of the organization.
- Gather data – whether formally through a survey or focus group or informally through feedback or in supervisory meetings – about how employees feel about their onboarding, their knowledge and confidence to execute their role’s responsibilities, and their ability to move into a new role.

Not sure where to start?

Remember, part of succession planning is implementing strategies for transferring critical knowledge from current leaders to their successors. Some potential first steps may look like:

- Identify the knowledge, skills, abilities, and competencies needed for each position. If you work in a large health department, start small with yourself, one team, or one department first.
- Review all existing documents needed for onboarding or describe a position’s knowledge, skills, abilities, and competencies in order to identify what is missing and what is needed.

Additional Resources

<https://www.nalboh.org/page/SuccessionPlanning-inPublicHealth>

<https://nnphi.org/resource/succession-planning-toolkit/>

<https://www.ruralcenter.org/resources/board-leadership-module-5-succession-planning-and-employee-development>

Contact Information

For more information, contact workforce@naccho.org

Appendix

Training and Succession Plan Template Clermont County Health Department

About this workbook

There are 8 worksheets in this workbook.

- Instructions
- Training Plan
- Steps
- Coverage Responsibilities
- Access
- Committees
- Partner Contacts
- Laws and Regulations

The instructions for each worksheet are included as a comment within the respective column or row fields for data entry. A text box note is located to the right of the information where applicable and can be removed when a training/succession plan is saved. The training and succession plan framework can be adapted to meet the needs of the staff and their supervisors. Each tab is a suggested reference to consolidate resources to achieve job responsibilities and duty competency and proficiency. Routinely reviewing and adapting the fields to be applicable for real-time job coverage is critical to maintain this resource as a succession planning reference for each respective position. Supervisors should implement staff reminders for annual review and updates at minimum.

Identify Purpose and Set Benchmarks

Define why you are implementing a training plan: Is it for coverage, employee development, succession planning, or process improvement?

Create Training Plan

The training plan should link
-job descriptions
-critical job duties
-standard operating guidelines
-and other resources

Implement Training Plan

The initial implementation is to understand roles and responsibilities.

Track Training Progress

The plan should be a source to guide and document professional development and competency achievement.

Complete Training Plan & Maintain

Celebrate! Although the activities within the training have been completed, make sure to maintain this as a living document (update the relevance when and where applicable).

(Position Title) Training Plan

Job Tasks and Learning Objectives	Trainer(s)	Competency Goal Date	Additional Training Resources	Progress Notes
Employee Signature				
Supervisor Signature				

Laws and Regulations

Listing of laws and rules that are in operation in and impact the Health District

Program	State Law authorizing program	State Rules	Local Rules/Provides For	Permissive, contracts, etc.
Environmental Health				
Food Service Operations	3717 ORC	3701-21 OAC 3717 OAC	N/A	License, Inspection Food services and Vending State oversight ODH
Food Establishments	3717 ORC	901 OAC 3717 OAC	N/A	License, Inspection Food Establishments State oversight ODA
Public Swimming Pool	3749 ORC	3701-31 OAC	N/A	License, Inspection Public Pools, State approves plans State oversight ODH
Bathing Beach program			None	
Campgrounds	3729 ORC	3701- 25 & 26 OAC	N/A	License, Inspection Campgrounds, state approves plans State oversight ODH
Recreational Vehicle Camps, Park Camps	3729 ORC	3701-26 OAC	N/A	License, Inspection
Manufactured Home Parks	3733 ORC	3701-27 OAC	N/A	License, inspection Mobile Home Parks, state approves plans State oversight ODH
Agricultural Labor Camps	3733 ORC	3701-33 OAC	N/A	License, inspection ODH conducts program
Tattoo and Piercing	3730 ORC	3701-9 OAC	N/A	Permits, inspections, approve training of employees Law provides authority to LHD

This tab references laws and regulations in the state of Ohio as they relate to the operations of health districts in Ohio. The rules and regulations in this table should be reviewed and updated routinely to include any relevant updates. The laws and regulation list is only a list reference. For guidance, the rule and regulation should be referenced on the legislative service commission page.

For a complete list of the laws and rules, click [here](#).

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The mission of the National Association of County and City Health Officials (NACCHO) is to improve the health of communities by strengthening and advocating for local health departments.

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