

SECURING OUR TOMORROWS

Henry County Health Department Napoleon, Ohio



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

[Henry County Health Department](#) is located in Napoleon, Ohio and serves a population of approximately 27,520 residents with 33 full-time and 8 part-time staff. The department provides essential public health services including health and clinical services, environmental licensing and regulatory services, and community support and education.

HCHD has been continuously improving workforce development as a priority focus since 2019. As a result of the 2021 [PH WINS report](#) (the Public Health Workforce Interests and Needs Survey), the COVID-19 pandemic, and many sequential retirements, the need for succession planning became clear. A current HCHD strategic goal is “Workforce Development,” which includes greater utilization of the Workforce Development Plan and completion of the Succession Plan. Department staff adjusted the Ohio State University/NACCHO Guidebook: Succession Planning for Local Health Departments to initiate and support the successful transition of knowledge and improve retention within their small health department.

Actions

- To utilize succession planning for positions at the health department, a succession planning team, which included the health commissioner and a Human Resources (HR) representative, convene a planning process every 2 years to draft a succession plan that identified key positions and their talent pool.
- Health department staff and leadership were consistently engaged in the planning process. The plan was available to staff at all levels, the process of succession planning was explained by the HR representative in department meetings, and monthly one-on-one meetings were held between the health commissioner and each member of management to discuss succession planning ideas and objectives.
- Due to the succession plan recognizing that focusing solely on internal candidates as the talent pool for upcoming positions for which employees were retiring in the next five years was not enough, a talent pipeline was developed through a contract with 2 local colleges to initiate a formal internship program.

“I think the realization of the differences between replacement planning and succession planning was huge! Further, through focusing on individuals’ competencies and being creative with stretch projects, we found various ways to identify skills and talents naturally. It opened our eyes to stop thinking that all succession planning happens within one division of the agency.”

Challenges

- Having limited staff time dedicated to succession planning and education was initially the greatest challenge during the initiation of the succession planning process. Adopting a standard schedule of revisiting succession planning with leadership and managers and bringing it up consistently in meetings helped resolve this issue.
- During the first round of succession planning, there wasn’t a significant number of staff members trained in the process. The HR representative and health commissioner did most of the work to identify core competencies and lead the team until the rest of the succession planning team, comprising management staff, was trained and had buy-in in the key concepts.
- Evaluating the succession planning process was a challenge initially because they had not done it before. HCHD utilized John Wiseman’s “Succession Planning and Management Best Practice Assessment Table” as an evaluation tool. During the first year, HCHD assessed 18 best practices, and 10 were met across the agency, indicating improvement and understanding.
- Budgetary constraints may affect staffing. If the health department loses funding and subsequently staff, they will not be able to follow the succession plan as intended. However, organizational restructuring does depend on the concepts of succession planning.

Unique Resource Developed

Title: Scaled Version of the OSU/NACCHO Guidebook: Succession Planning for Local Health Departments

Description: Henry County Health Department adjusted the existing NACCHO Succession Guidebook to align with the functions of a small health department, which provided a tangible framework/template for continued quality delivery of public health services. The health department presented its process at a NACCHO360 session in 2024, sharing their “Key Questions to Assess Knowledge Management” and their use of “Weisman’s Succession Planning & Management Best Practices.”

Impact: Successful transition of knowledge, and a greater flow and connection of workforce initiatives and strategic planning, as well as increased employee engagement.

Key Takeaways

- Find an existing model and adjust it for your organization’s needs.
- Have patience, as it can take years to implement a succession plan.
- Just start! You can’t learn to drive in a parked car.
- Identify and designate one person to be a “champion” or to be well-versed about succession planning so there is one clear point-of-contact and advocate, especially if you work in a larger health department; ideally someone who is not human resources or in management.

Not sure where to start?

Remember, part of succession planning is developing a talent pipeline and taking into account data and trends that affect turnover and retention. Some potential first steps may look like:

- Enroll in NACCHO’s “[Succession Planning for Local Health Departments](#)” asynchronous eLearning course and utilize the Guidebook. (A [myNACCHO account](#) is required for log-in.)
- Reach out to your Human Resources (HR) department to gather information on hiring processes and turnover trends. HR is often an overlooked potential collaborator in succession planning efforts!

Additional Resources

Lattimer, C. (2023, February 16). *Effective succession planning is an essential leadership tool*. The People Development Magazine. <https://peopledevelopmentmagazine.com/2023/02/16/effective-succession-planning/>

Public Health Accreditation Board. (2022). *Standards & measures version 2022*. Version 2022 - Public <https://phaboard.org/accreditation-recognition/version-2022/>

Public Health Foundation. (2021, October 21). *The council on linkages between academia and public health practices 2021 core competencies for public health professionals*. https://www.phf.org/resources-tools/pages/core_public_health_competencies.aspx

Routch, K., Doherty, M., and Monahan, K. (2018, September 27). *The holy grail of effective leadership succession planning: How to overcome the succession planning paradox*. Deloitte Insights. <https://www2.deloitte.com/us/en/insights/topics/leadership/effective-leadership-succession-planning.html>

Schmalzried, Hans. (December 11, 2013). *Succession planning in LHDs: How we do it (Part 2)* [Video]. YouTube. <https://www.youtube.com/watch?v=co2gc-q7qMDg&t=3054s>

Schmalzried, Hans. (January 23, 2014). *Succession planning for local health departments Part 3* [Video]. YouTube. <https://www.youtube.com/watch?v=-jkUbzcJ72eU&t=2653s>

Succession Planning Resources. (2018-2025). Sigma Assessment Systems, Inc. Retrieved February 14, 2025, from <https://www.sigmaassessmentssystems.com/succession-planning-resources/>

The Ohio State University College of Public Health. (2020, May 18). *Succession planning for local health departments: Ensuring talent sustainability for optimal public health outcomes*. <https://osupubhealth.catalog.instructure.com/courses/succession-planning-for-local-health-departments>

Wiesman, J.M., Babich, S.M., Baker, E.L., Umber, K. (2016). Succession planning and management practice in Washington state local public health agencies. *Journal of Public Health Management and Practice* 22(6), p 512-519. DOI: 10.1097/PHH.0000000000000397

Contact Information

For more information, contact workforce@naccho.org

Appendix

Henry County Health Department

Key Position Categories and Questions

Category	Definition	Questions to Consider
Single Incumbent/Stand-alone positions	Positions in which the expertise is concentrated in one or a small number of incumbents, or there is only one person who performs the unique position duties in the office. Ex. Epidemiologist	What are the unique duties and why did you identify them as such? Can anyone else complete these functions if the incumbent is absent?
Key task	Performs critical tasks that would stop or hinder vital functions if missing.	Would the absence of the tasks prevent vital functions? Can anyone else complete these functions if the incumbent is absent?
Specialized or unique skills sets	Acquired over time or through specialized training or education; hard to replace.	Does the agency have the capacity to provide the required training or development to grow the specialized knowledge? Is there limited bench strength of individuals that can perform the function(s) that utilize this expertise?
Difficult to replace	Position for which the agency has difficulty finding qualified candidates.	Is a skill set needed that can only be gained by working over a period of time within the agency? Has it historically been difficult to attract a qualified applicant pool?
Geographic challenges	Difficult for someone located elsewhere to carry out functions.	Are there unique duties that require the position to be site-specific/dependent? Are there site/location-specific attributes that prevent the position from being elsewhere? For example, systems, accessibility, security classification, materials, safety considerations, privacy)?
Difficult to retain or risk of attrition	High turnover due to multiple factors.	Is there a high amount of turnover in the position? Is the position entry level and used to get a "foot in the door"? Is this position used as a "feeder pool" for other positions? Are there high performers or critical functions that are at risk of leaving due to role dissatisfaction or have high demand skill sets?

Retirement vulnerable	Will become eligible to retire within five years.	Are there retirement vulnerable individuals who have expressed intent to retire? Has the employee started the retirement process or provided notice of retirement?
Executive/Senior Leadership Positions	Senior-level positions with senior leadership or executive management responsibilities. Ex. Health Officer, Department or Program Director	Does the position or department require consistent executive management presence/oversight/principal accountability?
Administrative Leadership Positions	Administrative - Positions that provide administrative leadership in carrying out the business activities of the organization in support of its mission. Ex. HR Director, Chief Operating Officer	Would the organization's administrative functions fail or cease if the positions is vacant or the successor does not possess the proper skill set?
Mission Essential Positions	Positions that require considerable professional, scientific, or technical expertise to carry out the work. These positions make a unique contribution to the organization's mission. Ex. Public Health Nurse, Health Equity Specialist, Emergency Response Coordinator	Will the absence of the duties required in the position result in a degraded or failed mission? Can anyone else complete these functions if the incumbent is absent?

Key Position Scoring Sheet

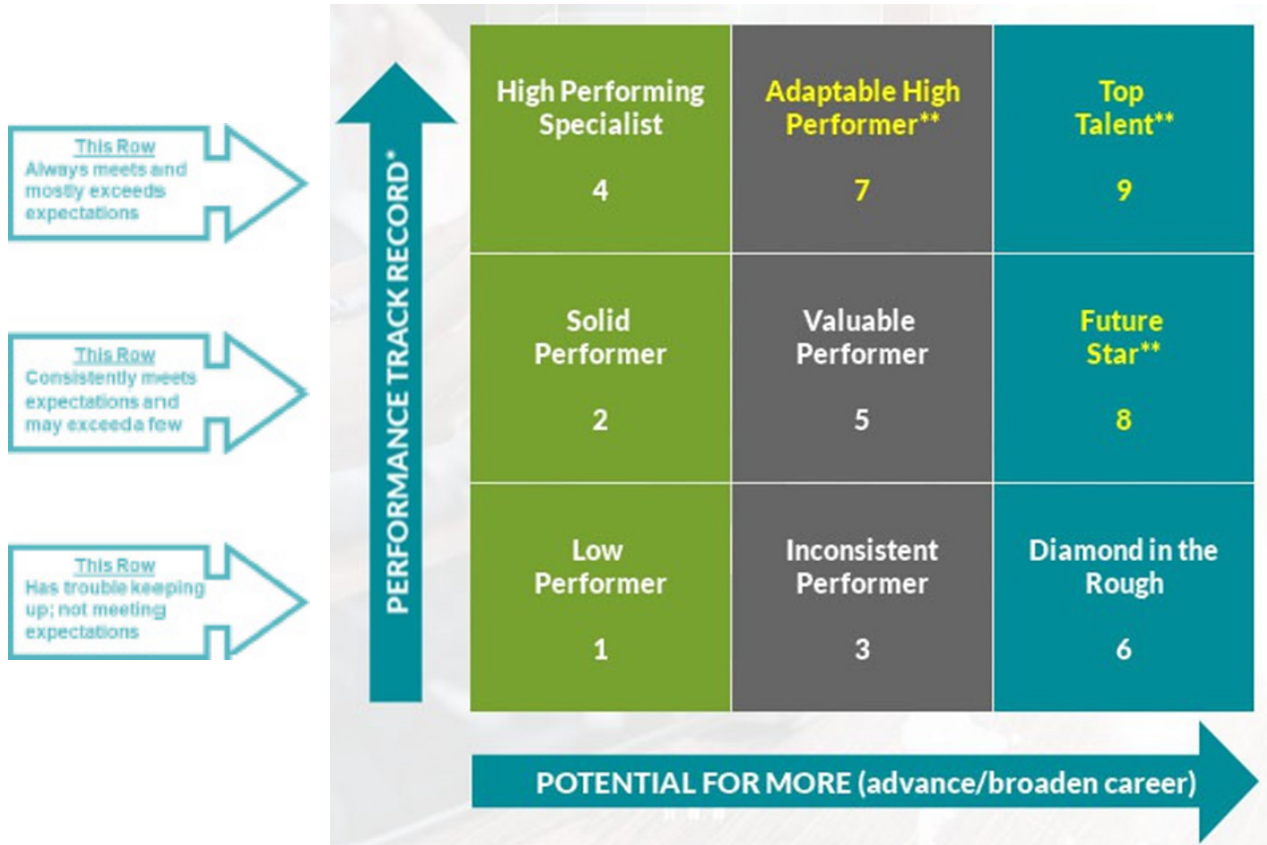
Position	Brief Description	Single Incumbent/ Stand Alone	Difficult to Retain	Difficult to Replace	Risk of Attrition	Retirement Vulnerable	Mission Essential	Geographic Challenges	Key Task
----------	-------------------	-------------------------------	---------------------	----------------------	-------------------	-----------------------	-------------------	-----------------------	----------

Succession Plan Target (Y/N)	Knowledge Management Plan Priority Rating (Consider complexity of task, urgency of knowledge transfer, expected departures, etc.) 1=Highest priority 2=Mid-level priority 3=Lowest priority
------------------------------	--

Knowledge Management Questions

1. What are the critical tasks of your current position? (Critical tasks are significant contributions towards promoting success that affect the District's ability to function properly.)
2. Is there unique knowledge inherent to the success of this position? If so, please describe.
3. Does anyone else have this knowledge in this organization? If so, who?
4. How critical is it that this knowledge is documented and shared?
5. Are all of the key processes and guidelines for this position documented? Do you have a procedures manual for your position? If so, is this procedures manual electronic or hard copy? Who currently has this document? Please explain.
6. What are the critical ongoing projects for this position? Where is the associated documentation and status reporting kept?
7. Please outline key deliverables in your role using the time frames below:
 - Daily
 - Weekly
 - Monthly
 - Quarterly
 - Yearly
8. Of the key meetings/committees/working groups you attend, which are most critical for achieving success in your position?
9. What are some of the key issues and challenges faced in accomplishing the work?
10. What changes would you recommend (I wish I could...)?
11. What has been the average number of direct reports for this position?
12. What are the key resources necessary for the success of this position (i.e. compliance, laws, regulations, annual reports)?
13. What trainings, certs, and professional development do you recommend for this position?
14. Is there a repository of the (staff, budget, clients, any other operations records) and if so, where?
15. What systems are frequently used and require access?
16. Are there any resources or responsibilities that you reallocate or realign?
17. Are there any publications that you contribute to regularly as part of the position? If so, which?
18. What methods do you suggest for transferring key knowledge for this role?
19. For those overseeing a department: Please provide a brief analysis of your department. Examples: strengths, weaknesses, opportunities, and/or challenges.
20. Please share any other comments or concerns you might have.

Matrix Descriptions



This Row
Always meets and mostly exceeds expectations

This Row
Consistently meets expectations and may exceed a few

This Row
Has trouble keeping up; not meeting expectations

* Based on Performance Review Results
** High Potential

This Column
Specialized or expert talent and/or may have reached career potential

This Column
Could be promoted one or more levels in career or lateral move with greater scope/challenge

This Column
Demonstrated high potential to advance further, perhaps 1-2 levels in 3-5 years

<p>(4) High Performing Specialist</p> <ul style="list-style-type: none"> * Consistently exceeding expectations in current role * Specialist likely to be a leader in their field of expertise OR * Solid general manager with strong results at their level * Shows limited interest in alternative or more diverse roles * Narrow or niche perspective * Not judged to have potential to take on roles outside current job family 	<p>(7) Adaptable High Performer</p> <ul style="list-style-type: none"> * History of strong results * Demonstrated leadership within and outside of own area * Actively seeks more challenging work * Ready to take on stretch roles at same level * Judged capable of working at more complex levels given appropriate opportunities and development * Has yet to “hit the ceiling” of their potential 	<p>(9) Top Talent</p> <ul style="list-style-type: none"> * Excellent performance track record * Demonstrated capability to work at higher and more complex levels * Demonstrates strong leadership capabilities across the business * Quick learner, strategic thinker and excellent problem solver * Drives self and others to greater achievement * Consensus view that this person is highly talented and a high performer
<p>(2) Solid Performer</p> <ul style="list-style-type: none"> * Consistently meeting expectations in current role * Does not demonstrate capability to handle increasing complexity and ambiguity * May not seek to broaden skills * Shows little interest outside own area * Adapts slowly to new situations * Not judged to have potential to take on roles outside current job family * Specialist versus utility player 	<p>(5) Valuable Performer</p> <ul style="list-style-type: none"> * Consistently meeting expectations in current role * Demonstrates some capability to handle more complex and ambiguous activities * Adapts to new situations with time * Sees the bigger picture and acts with it in mind (business, industry, etc.) * Thinks beyond the day to day * Needs to be stretched to fully assess capability to work at higher level 	<p>(8) Future Star</p> <ul style="list-style-type: none"> * Consistently meeting expectations in current role * Demonstrates capability and desire to take on more complex and ambiguous activities * Readily adapts to new situations * Naturally curious and a quick learner * Keen to build and broaden skills * May be new to role or level * Not enough track record to judge as “promotable” but shows potential
<p>(1) Low Performer</p> <ul style="list-style-type: none"> * Not meeting current role expectations * Skill set does not match the needs of the role * Struggles to produce results or shows little interest to do so * Expresses little desire to improve * May have been over promoted or promoted too soon * Fails to adjust to new situations 	<p>(3) Inconsistent Performer</p> <ul style="list-style-type: none"> * Not meeting current role expectations * Demonstrates some capability to handle higher level work * Capable learner but may not translate learning to business results * May be new to role, organization, or in the wrong position * Not engaged with current role * Judged as having potential to progress but needs to perform at current level 	<p>(6) Diamond in the Rough</p> <ul style="list-style-type: none"> * Not meeting current role expectations * Demonstrates clear capability to handle more complex and ambiguous activities * Demonstrates high potential but may be new to role/level or in wrong role * Strong, quick learner but may translate that to business results

This document was made possible through cooperative agreement #6NU38PW000037-01-01 from the Centers for Disease Control and Prevention. The content and methods used to develop this document are solely the responsibility of the authors and do not necessarily represent the official views of the CDC.



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.

1201 Eye Street, NW ● 4th Floor ● Washington, DC 20005
P 202.783.5550 F 202.783.1583

© 2025. National Association of County and City Health Officials

www.naccho.org