

Succession Planning

“It’s about preparation, not pre-selection”

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NASTAD

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Learning Objectives

- Define succession planning and its importance
- Identify the risks and benefits of succession planning
- Share practical approaches and promising practices
- Review of NASTAD TA Opportunities and succession planning resources

Session Agenda

- Welcome and introduction to succession planning
- Roadmap to succession planning
- Risks and benefits
- Program spotlight
- NASTAD TA opportunities and available resources
- Questions and discussion

What is Succession Planning

NIH defines succession planning as:

*“the process of **identifying critically** important positions in the organization and **creating a talent pipeline**, by **preparing employees** to fill vacancies in their organization as others retire or move on.”*

- The most effective way to minimize the impacts of lost leadership is to develop a process to identify and foster the next generation of leaders through mentoring and training opportunities.

Source. https://hr.nih.gov/sites/default/files/public/documents/2021-03/Succession_Planning_Step_by_Step_Guide.pdf

Roadmap to Succession Planning



1. Identify critical roles
2. Create position profiles
3. Assess and identify qualified staff's skills and interest
4. Create a development plan
5. Engage identified staff in learning opportunities
6. Assess staff's readiness
7. Evaluate the process and its impact annually

Photo source. <https://www.education.vic.gov.au/hrweb/PublishingImages/SPlan-Model.jpg>

Risks and Benefits

Risks

- Loss of knowledge and experience from skilled or specialized employees
- Loss of internal candidates who may be interested in a leadership role
- Selecting the wrong candidate
- Disruptions to workplace processes, workflows, and protocols

Benefits

- Reduce the risk of staff turnover in critical roles
- Provide staff with professional and career development opportunities
- Maximize the chances of recruiting qualified candidates to vacant critical roles
- Create a diverse pool of people with the capability to take on critical roles and functions within the program

Program Spotlight

Mitchell Namias, Pharm.D, AAHIVP
ADAP Director, Pharmacy Consultant
TB, HIV, STD, & Viral Hepatitis Section
Connecticut Department of Public Health

Approach in Action

- Two staff members announced intention to retire
 - Part B Director
 - Data Manager
- Program staff worked together to design a succession plan
 - Identified new staff responsible for programmatic reports
 - CQM Coordinator already cross-trained in data management and willing to take on some of these responsibilities
 - Contract Managers began to cross-train new ADAP staff member in Part B
 - Began planning for future retirements or departures from the program

Key Considerations

- Write down your procedures, especially if you are the only one completing the work
 - If working on a spreadsheet, include a sheet that has a key and definitions and instructions
- Cross-train
 - In CT, ADAP Coordinator is cross-trained in Part B management
 - ADAP Support Staff is being cross-trained in Part B contract management for subrecipients
 - CQM Coordinator cross trained in data management
- Identify important people at your agency and develop good working relationships
 - What is the Request for Proposal process like at your agency?
 - Who do you contact for contract initiation?
 - When should you reach out for help with fiscal issues?
 - How early should these processes start?
- Communication is critical!
 - Monthly staff meetings with all the key players
 - Relay any issues to management

NASTAD TA Opportunities

- **Mentorship:** provides a year long peer-based mentoring program that matches Part B and ADAP coordinators with experienced peer coordinators to guide and instruct on self-selected topics related to Part B and/or ADAP management.
- **ADAP Learning Collaborative:** provides a 12-month online learning curriculum for newly hired Ryan White HIV/AIDS Program (RWHAP) AIDS Drug Assistance Program (ADAP) recipient staff. It provides individual participants with knowledge and skills building activities for staff to support competency and retention.
- **Highly Intensive Technical Assistance and Problem Solving (HITAPS):** provides a year of intensive and tailored TA to select jurisdictions according to their respective needs and assets.*
- **Peer TA Calls:** provides space for jurisdictions to connect with each other one-on-one regarding various topics to offer support by sharing practices, approaches, and resources through a NASTAD facilitated call.

*Not currently available

Available Resources and Tools

NASTAD

Ryan White Part B Program and ADAP Policy and Procedure Manuals and Institutional Succession Plans: designed to assist states in creating localized policy and procedural manuals and succession plans to provide programmatic rules and regulations, as well as provide institutional memory for a new Ryan White Part B Program Coordinator or ADAP Coordinator. (update anticipated Fall 2022)

University of Washington

Succession Planning toolkit: designed to move you through the succession planning process with series of worksheets, templates, and tips

National Institutes of Health

Succession Planning Step-by-Step Guide: designed to increase awareness of succession planning process and offers succession planning templates to guide implementation

Succession Planning Profile template: designed for creating a profile of the competencies, skills, and institutional knowledge required for success in this critical position.

Ways to connect with NASTAD

- **Request Technical Assistance,**
<https://nastad.org/technical-assistance>.
- **NASTAD resources,** <https://nastad.org/resources>
- **NASTAD, Health Care Access team,**
<https://nastad.org/teams/health-care-access>

Cited Sources

- National Institutes of Health, “Succession Planning: A Step-by-Step Guide”. [https://hr.nih.gov/sites/default/files/public/documents/2021-03/Succession Planning Step by Step Guide.pdf](https://hr.nih.gov/sites/default/files/public/documents/2021-03/Succession_Planning_Step_by_Step_Guide.pdf)
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- Department of Education and Training Victoria, Succession Planning. <https://www.education.vic.gov.au/hrweb/workm/Pages/successplanNSCH.aspx>
- University of Washington, “Succession Planning Toolkit”. <http://hr.uw.edu/pod/wp-content/uploads/sites/10/2018/08/Succession-Planning-Toolkit.pdf>

Let's chat about it!

Questions and Discussion

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