Tips for Managing Staff Transitions and Maintaining Evidence-Based Program Delivery Capacity

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Key Takeaways

> **Staff changes are an inevitable part of any organization, and they can leave gaps in evidence-based program delivery.**
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> **When community-based organizations are prepared to handle staff changes, these can be chances for improvement to continue serving older adults in the community.**
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> **These tips can help prepare you and your organization for staff changes and smooth transitions.**

Staff transitions, while challenging, are part of every organization and profession.

- Of the Falls Prevention and Chronic Disease Self-Management Education grantees gathered at the Capacity Building and Infrastructure Workgroup in May 2024, 70% said they had experienced staff transitions in the past few years since the start of their grant projects.

- Almost 50% of all employees in health agencies throughout the U.S. changed jobs between 2017 and 2021.

- More than 100,000 public health workers may leave their positions by 2025.[1]

The success of effective delivery and promotion of health promotion evidence-based programs (EBPs) relies heavily on staff and volunteers, as well as community-based organizations (CBOs) serving as community care hubs or implementation sites.

Staff transitions are unavoidable, but they don't have to hamper EBP delivery.

How staff transitions challenge EBP delivery

When an organization loses its program coordinators, leaders, or coaches, the effects of such loss can negatively impact the delivery and sustainability of EBPs.

For example, staff turnover can create a need for extra time and cost to find and train new staff. CBOs may have to postpone or cancel workshop delivery. "It can take months before a replacement can be found, and it takes months to train them, for them to go through required leader training," said one ACL

CDSME grantee.

The loss of a staff member can also affect the partnership or relationship built within a community. One grantee shared their experience of losing "high-quality coordinators" who had significant experience, community connections and resources. And losing these champions mean losing a geographical area of service once the relationship ends.

How to manage staff transitions and maintain staff capacity

These negative impacts can be minimized when CBOs are well-prepared to handle staff changes, maintain the program capacity, and even turn it into an opportunity for improvement to continue serving older adults in the community.

Here are some practical tips shared by grantees who have experienced and overcome staff transitions:

1. Develop a position-specific handbook or manual

While many organizations may have an employee handbook to help communicate essential information about the organization, a manual or handbook for a specific position is also helpful for both the organization and the staff to define and understand its scope of work and responsibilities, and how to navigate through the multifaceted, complex processes of EBP operation.

Paulita Edwards-Childs, Healthy Aging Director at **Mississippi Department of Health Office of Community Health Improvement,** an ACL Falls Prevention grantee, built her own "Falls Prevention Coordinator Guidebook" when she first started her position as the Falls Prevention Coordinator. "I used to be involved in helping kids from age 0 to 3. I didn't know anything about falls prevention or programs. I had to learn quickly."

Edwards-Childs documented everything she learned as she went through the process, from program-specific details, point of contact for public service announcements, budget and contracts, and office location, to contact information and roles of implementation partner sites. "Now I'm promoted to a director, and this coordinator guidebook will come in very handy for the new person coming on board. They will know what to do and who to talk to," she said. "They can also update this with what they learn. Things change quickly around here."

2. Develop a project- or program-specific standard operating procedure

Often, individual staff members wear many hats at community-based organizations, and one project can involve many people across the organization. Having a project or program-specific Standard Operation Procedures (SOPs) is vital for getting things done efficiently and keeping them organized.

The purpose of an SOP is similar to that of the manuals mentioned earlier. An SOP documents step-by-step instructions and day-to-day routines of the project or program so anyone who follows these procedures can perform their tasks. It is a tool to inform and educate staff so the knowledge is available and passed on seamlessly, helping anyone involved in the project—especially new staff members and existing team members who step into the new role temporarily—to better understand the whole project right from the start.

After experiencing multiple staff transitions during the grant periods since 2015, **Health Promotion Council** (HPC) in Philadelphia, a CDSME grantee, developed a comprehensive SOP specifically for ACL grant-related activities to ensure their success in delivering and sustaining EBPs amid staff transitions.

In HPC's "Standard Operation Procedures: Administration for Community Living Grants," everything the staff involved in this project should know is documented, including:

- Purpose of the SOP

- Overview of grant activities

- Definitions of frequently used terms and acronyms

- EBP licensing requirements and processes

- Description of all EBPs offered as grant deliverables

- Fidelity of EBPs

- Roles and responsibilities of participants, lay leaders, Master Trainers, Program Coordinators, and Data team

- Recruitment strategies

- Data collection procedures

- Appendices with survey forms, templates, flyers, etc.

Download and view the Health Promotion Council SOP

When developing an SOP for ACL Falls Prevention or CDSME Grant, consider including the link to **ACL Falls Prevention and CDSME Grantee Onboarding Resources**, a resource hub created by the National CDSME and Falls Prevention Resource Centers. It contains multiple resources on webinars, tools for implementation, data management, and grant-specific requirements.

3. Ask each staff to create a transition plan before leaving the organization

Again, documentation is key. When someone submits their resignation, ask them to record in writing not only their duties and responsibilities, but also their outstanding projects, upcoming deadlines, and key contacts in a staff transition plan. The National Institute of Health has a **Workforce Planning Toolkit** and **Staff Transition Plan Template to help.**

4. Communicate with internal and external stakeholders promptly and maintain relationships

Because successful delivery of EBPs depends on partnerships and relationships within and outside the organization, it is critical to maintain communication with those stakeholders about staff changes and what can be expected.

Using position manuals, SOPs, or Staff Transition Plan, contact the stakeholders about the personnel change and assure them that your organization will continue to work with them. Be transparent if you need time to learn about them and rebuild the relationship. In turn, they may be able to support you in educating you about programs and their operations. If there are no deliverables or shared projects, keep in touch with them periodically to maintain relationships for future collaboration.

When one of the ACL CDSME grant project managers started at her position, she had no idea about the grant activities as she was brought in from another department to fill in the sudden gap created by two primary staff leaving their positions. She worked closely with partners, asking questions and hosting a call to inform them about recent staff changes and delays these changes might cause. She also worked closely with her teammates who were not part of the grant project but were helpful as they worked with similar partners and target populations in promoting different types of EBPs.

5. Assess project and organizational priorities

You may want to reassess the project and organizational priorities before quickly hiring a new person for the same position and job responsibilities. Especially when the resources are limited, defining and determining what kind of skillset, talent, and experience would be most beneficial may help enhance program capacity in the long run despite staff transitions.

For example, **the University of Wyoming Center for Aging (WyCOA) <https://www.uwyo.edu/wycoa/index.html>** , a CDSME grantee, had a highly skilled marketing coordinator at the beginning of the grant period. They developed attractive marketing materials, launched social media campaigns, and provided data analytics. However, WyCOA struggled to find a replacement when their marketing coordinator transitioned to another position.

While searching for the best candidate, they determined they already have fantastic marketing materials. So they decided to focus on program expansion and implementation through more robust partnerships and sustainability strategies. With this shift, they onboarded a new project manager with extensive knowledge and experience in leading and designing health promotion programs, strengthening its delivery infrastructure, and cultivating sustainability pathways forward.

6. Recruit from various sources

In this tight and fluid market of public health professionals, look for ideal candidates within and outside of your network, reconnecting with the people from past collaboration or finding someone completely new. HPC recommends using existing programs and connections to identify potential staff, leaders, trainers, and their connections to others. They have also contacted past volunteers and partners who have thrived in their performance to see if they are available or interested in joining the team. Staying connected helps to build a pool of high-quality candidates.

Exploring alternative staffing options may also be helpful. Consider reaching out to AmeriCorps, university co-ops, long-term interns, and workforce development programs in your community. You will often find enthusiastic, mission-driven, highly skilled individuals ready to serve the community.

7. Strive to improve staff experience

While staff transition is inevitable, staff retention is essential to any organization. There are no quick or automatic fixes. However, supporting and caring for your staff goes a long way. Take some time to get to know your staff. Knowing individuals' strengths and areas of support can help you identify how they can thrive in your organization. Provide training and technical support as needed and keep them engaged. Foster their growth and offer professional and personal development opportunities.

Creating chances for collaboration and teamwork also encourages relationship-building among co-workers. Invest the time to build a culture of teamwork and a sense of belonging. Create a positive work environment where constructive feedback and questions are encouraged.

Recognition and rewards are also effective in improving staff experience. Being publicly recognized helps everyone know when others are appreciated. Despite the effort, things may not turn out as planned. While this is disappointing, recognize their efforts so they are encouraged to do better next time.

Lastly, providing thriving and willing staff with opportunities for career advancement within your organization may help retain dedicated staff. They are the assets: they have the knowledge, expertise, and connection to the external stakeholders that your organization has invested in and benefited from. Witnessing the internal upward mobility opportunity also encourages and gives hope to the new staff to stay at your organization and continue to grow.

Sources

1. Harvard TH Chan School of Public Health. U.S. governmental public health workforce shrank by half in five years, study finds. March 8, 2023. Found on the internet at https://www.hsph.harvard.edu/news/hsph-in-the-news/u-s-governmental-public-health-workforce-shrank-by-half-in-five-years-study-finds/