From Onboarding to Succession: Strengthening Fiscal Team Capacity

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Meet Your Presenters

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Why This Session Matters

01 —— Operational and Risk Focus

02 —— Accountability and Continuity

03 —— Retention and Trust Impact

04 —— Real-World Tools for HHS

What You Will Leave With

01 Improve Retention

By spotting burnout risks, balancing workloads, and setting clear expectations

02 Speed Up Readiness

With a 30/60/90-day onboarding plan, cross-training, and documented handoffs

03 Reduce Silos

By setting team routines, defining decision-making authority, and establishing well-defined teaming structures

04 Build Healthy Teams

With psychologically safe, inclusive, and high-trust team environments

Icebreaker Question

What happens if someone on your team leaves suddenly or is out for two weeks?

Where does your work get slowed down or stuck?

Onboarding & Speed-to-Readiness

Onboarding is one of the biggest levers you have for reducing operational risk.

Speed-to-Readiness

Move past orientation and system access. A structured 30/60/90-day plan clarifies expectations, builds skills intentionally, and reduces uncertainty for both the employee and the team.

Cross-Training & Handoffs

Cross-training keeps work moving when someone is unavailable and removes single points of failure. Documented handoffs ensure knowledge does not live with just one person.

Common Health & Human Services Finance Silos

Silos are usually structural, not personal. The goal is stronger connections at planning and decision points rather than eliminating them.

Fiscal vs. Program Staff

Communication often happens late in the process, creating misalignment between financial and programmatic priorities.

Grants, Procurement & Budget

Each unit works efficiently on its own but is not always aligned with the others at key decision points.

Finance Left Out of Design

When finance is not included early in program design, it creates rework, delays, and compliance risk later.

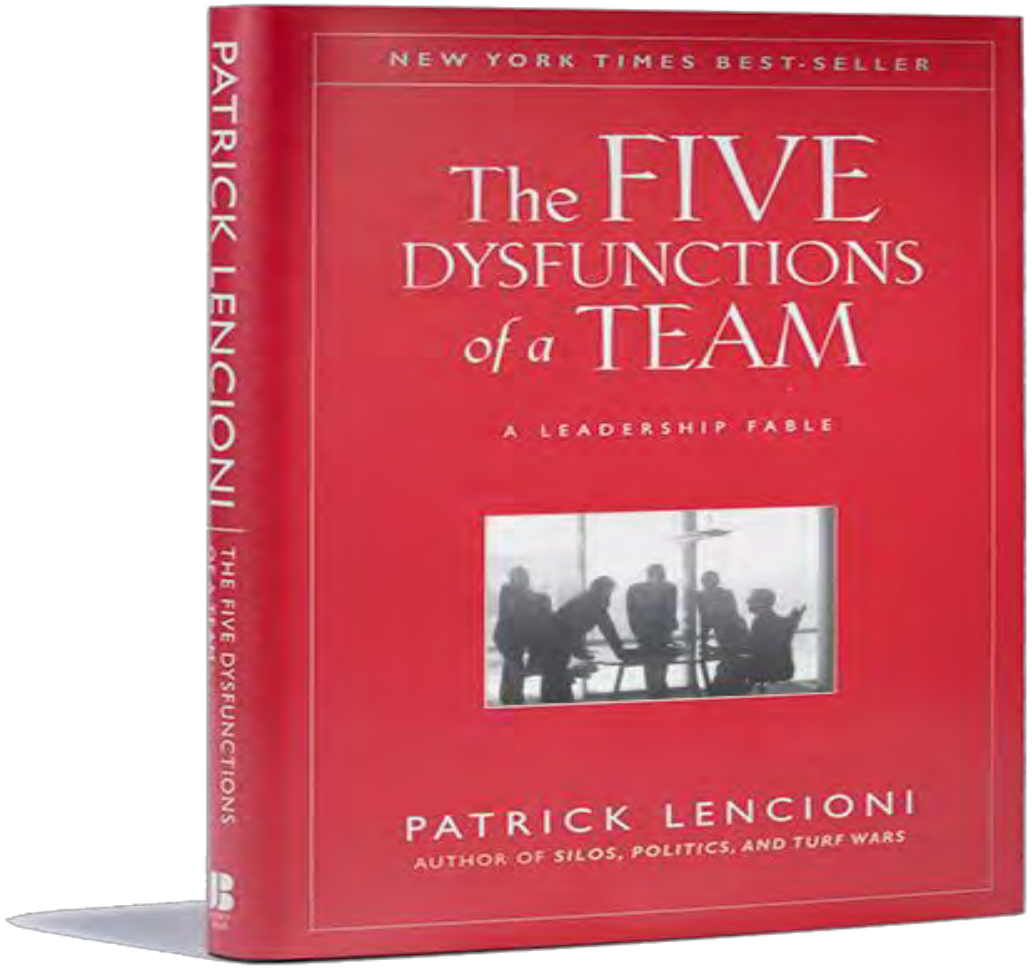
Retention in State Government

Top strategies for improving workforce retention.

Priority	Examples
Career Growth	Career pathways, professional development, mentoring, internal mobility
Supportive Leadership	Regular one-on-ones, coaching and feedback, recognition, psychological safety
Employee Well-Being	Workload management, cross-training, wellness programs, work-life balance
Effective Onboarding	Clear role expectations, structured onboarding, early check-ins, peer support
Workplace Flexibility	Hybrid work (where appropriate), flexible schedules, alternative work arrangements

Healthy Team Model

From Patrick Lencioni and The Five Dysfunctions of a Team



Types of Teams

Worst

Lack a sense of urgency
Compete instead of collaborating
Do not actively listen
Avoid difficult conversations
Resist change
Prioritize planning over action
React emotionally
Neglect routine tasks
Lack structure and accountability
Let interpersonal issues go unresolved

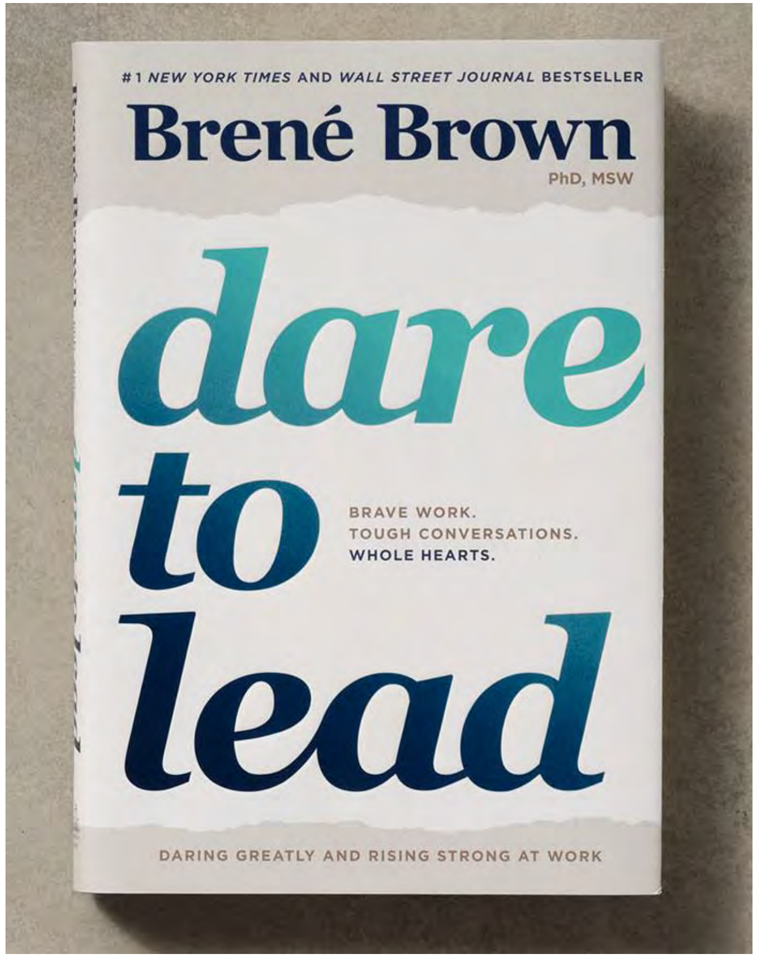
Best

Resilient and calm
Confident and adaptable
Respectful and collaborative
Organized and efficient
Curious and big-picture focused
Stay informed and current
Positive and supportive
Open to new ideas
Make data-informed decisions

Seven elements of trust:

B	BOUNDARIES
R	RELIABILITY
A	ACCOUNTABILITY
V	VAULT
I	INTEGRITY
N	NONJUDGEMENT
G	GENEROSITY

From Brené Brown, Dare to Lead



Decision-Making Map Activity

In small groups, map a recurring bottleneck by answering:

Who prepares?

Who decides?

Who must be informed, and when?

Succession Planning

1. Identify Critical Roles
2. Align with Organizational Strategy
3. Assess Current Workforce Capacity
4. Identify High-Potential Talent
5. Develop Successors Deliberately
6. Transfer Knowledge Before It Is Lost
7. Build Readiness Through Cross-Training
8. Engage Senior Leaders
9. Measure and Adjust
10. Reduce Organizational Risk and Ensure Continuity

Reframing Psychological Safety for Finance Staff

Without safety, people hesitate, and delay is where risk grows.

Psychological Safety

In fiscal environments of audits, compliance, and funding accountability, safety is directly tied to risk. It determines whether someone speaks up early enough to keep a small issue from becoming a large one.

Safety-Building Behaviors

Openness and curiosity instead of judgment, clear expectations that issues be raised early, and responses focused on problem-solving rather than fault.

Reflections

When do staff hesitate to raise concerns?

How do I typically respond under pressure, when mistakes or errors surface?

Commit to One Action

One action I will take in the next 30 days to reduce single-point risk, improve clarity, or increase trust is...

Did you pick one?

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Thank You

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