

# Succession Plan

## Oregon Medical Board

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### **Mission**

The mission of the Oregon Medical Board is to protect the health, safety, and wellbeing of Oregon citizens by regulating the practice of medicine in a manner that promotes access to quality care.

### **Vision**

To foster for every Oregonian a thriving, consistently excellent community of medical professionals.

### **Values**

**Integrity:** a commitment to acting honestly, ethically, and fairly.

**Accountability:** a willingness to accept responsibility for actions in a transparent manner.

**Excellence:** an expectation of the highest quality work and innovation.

**Customer Service:** a dedication to provide equitable, caring service to all Oregonians with professionalism and respect.

**Equity:** a devotion to creating and fostering an environment where everyone has access and opportunity to thrive.

### **Changes/Challenges**

The Oregon Medical Board adopted its Vision statement on April 4, 2024.

The agency's Medical Director retired on October 31, 2024. After a full recruitment, a new Medical Director was hired and began training September 4, 2024, and fully assumed the role on November 1, 2024.

The agency's database replacement project is currently paused, and DAS has issued a Notice of Default to the implementation vendor. The agency is evaluating potential paths forward, which may include developing the database in-house rather than with a contracted vendor.

A renewed emphasis on bolstering the health care workforce has resulted in more frequent and involved national and international collaboration with other policymakers.

With two of the eight members of the agency's management team eligible to retire now, or within the next five years, we need to be developing our leadership pipeline from our subject matter experts within the agency.

Finally, there are several other staff members eligible to retire now or within the next five years, including the entirety of our Licensing Call Center staff, which would significantly impact our customer service, which is one of our agency's KPMs.

**Progress Made | Previous Plan Year to Current**

*Summary of gains made from previous plan*

1. *Steps taken based on Development Concepts*
2. *Based on development efforts identified in the previous plan, has your agency been able to reduce the number of critical/highly critical positions?*

The Oregon Medical Board has made progress in the last 12 months to address the needs identified in our previous Succession Plan. Primarily, we have recruited for and hired a new Medical Director and successfully developed a policy option package to hire a permanent 0.5 FTE Associate Medical Director which should facilitate the longer-term retention of the MD position as well as build a “bench” for future coverage. This policy option package is in the Governor’s Recommended Budget but must still be approved through the Legislative process.

While we no longer consider the MD position as the highest priority due to the progress made over the previous 12 months, it is still a critical position in our small agency. Therefore, it is Position Number Two in this 2024 Succession Plan. As we proceed into 2025, we anticipate the most critical need for succession planning efforts will be focused on the IT classifications as we continue to pursue developing a new database which supports all program areas of our agency and retains our critical Level 3 data.

*Use this space to provide a review of your critical/highly critical positions and development progress from 2023.*

Position Identified in 2023	Critical/Highly Critical	Progress/Adjustments Made Based on 2023 Development Concepts
Medical Director	Highly Critical	Previous MD retired, new MD hired POP for Associate Medical Director (AMD) included in Governor’s budget for 2025-2027.

**2024 Identification | Critical/Highly Critical Positions**

*Use this space to capture positions identified as Highly Critical and/or Critical. Also include any identified positions from 2023 that are still considered Highly Critical/Critical.*

*Explain the direct business impact of not having the staff and competencies the agency needs in this position (consider the immediate impact as well as future impact). Specifically detail the consequences.*

## Highly Critical

### 1. Position Number One: IT Positions

- a. *Competencies of Position:* The IT positions are critical to the OMB's ability to securely and efficiently utilize the vast amounts of sensitive data involved in effectively licensing and regulating the practice of medicine in our state. With the shift in our database replacement project to focus potentially on in-house IT talent rather than an outside vendor, these competencies have become paramount to the agency's continued success. These competencies include database architecture, software development, quality assurance and testing, and data security.
- b. *Why identified as Highly Critical:* The risk of not successfully completing the database replacement project is that the agency becomes increasingly likely to have a significant issue with the ability to continue to provide licensing services as well as managing the investigations processes and effectively overseeing compliance cases. The current agency database was developed by a vendor that is no longer supporting it, which has necessitated the support moving internal to the agency, and prompted the need for a replacement solution. A vendor was hired to implement the new database; however, the vendor has been unable to uphold their commitments under the contract, and the contract has been paused and a Notice of Default was issued. This puts additional pressure on the internal IT team of 3 FTE to support the current aging database while potentially having to take on the added work of completing the new database solution.
- c. *Was this position identified on your 2023 Succession Plan?* Yes

<b>NOT A CRITICAL POSITION</b>	<ul style="list-style-type: none"><li>• Vacancy would cause limited impact</li><li>• Limited specialized knowledge or skills required</li><li>• Strong recruitment potential</li><li>• Competitive compensation package</li><li>• Limited direct promotional opportunities</li></ul>
<b>CRITICAL POSITION</b>	<ul style="list-style-type: none"><li>• Vacancy would cause an impact</li><li>• Some specialized knowledge or skills required</li><li>• Challenging recruitment</li><li>• Moderately competitive compensation package</li><li>• Skill set in demand</li><li>• Promotional opportunities</li><li>• Anticipate vacancy within the next 1 to 5 years</li></ul>
<b>HIGHLY CRITICAL POSITION</b>	<ul style="list-style-type: none"><li>• Vacancy would cause a significant impact</li><li>• Specialized knowledge or skills required</li><li>• Very challenging recruitment</li><li>• No competitive compensation package/compression issues</li><li>• Skill set in high demand</li><li>• Promotional opportunities</li><li>• Anticipate vacancy within the next year</li></ul>

## Critical

### 2. Position Number Two: Medical Director

- a. *Competencies of Position:* The Medical Director position is the only licensed medical provider on the OMB staff, making this individual critical to the OMB's ability to meet its mission. This position acts as the subject matter expert in determining if a licensee under investigation has possibly violated the Medical Practice Act.
- b. *Why identified as Critical:* The risk of this position being unfilled for any length of time will impact the investigations of complaints regarding medical care, as well as the agency's ability to present cases to the Board in a timely manner. This person also plays a critical role in reviewing some applicants for licensure and in answering questions from the medical community. If this position were unfilled for an extended period of time, it would impact our customer service and could delay issuing licenses.
- c. *Was this position identified on your 2023 Succession Plan?* Yes

## Critical

### 2. Position Number Three: Investigations Manager

- a. *Competencies of Position:* The Investigations Manager position is critical to the OMB in that regulating the practice of medicine requires that we can effectively and efficiently address complaints about licensees to ensure that the healthcare professionals we license are practicing safely, competently, and within the appropriate standards of care. The competencies for this critical position include leadership skills, the ability to manage the nexus of legal and medical challenges, understand and apply complex laws, as well as work within a team.
- b. *Why identified as Critical:* The current Investigations Manager is eligible for retirement, and the risk of this position being unfilled for any significant amount of time would be that a section of the agency would be without direct leadership and guidance, directly impacting our ability to meet our mission.
- c. *Was this position identified on your 2023 Succession Plan?* No

## 2024 Development | For Critical and Highly Critical Positions

*Use this space to explore how you plan to develop competencies in the Highly Critical and Critical positions to build the bench strengths of the position. If the position is a carry over from 2023, explain how your development plans have changed (if applicable).*

## Highly Critical

### 1. Position Number One: IT Positions

- a. *Development plan for competency development (how are you going to build the bench strength for this position).*

The intention for these positions is to focus on retention and to allow current staff to continue to develop their skillsets at the ISS 7 levels developing the new database solution. If the database development and implementation moves in-house, we would look to hire additional IT limited duration positions to support the ongoing day-to-day needs of the rest of the agency. Once the project is completed successfully, we will need to re-assess the ongoing agency IT needs regarding permanent positions.

- b. *Gaps: what are potential recruitment/retention challenges for this position?*

These positions are challenging to recruit due to the specialized knowledge required and due to the ISS classification series itself (specifically, these classification specifications are outdated and no one outside of state government uses those titles). Recruiting to specific IT competencies is challenging, in addition to the learning curve for new staff to understand agency processes and business needs.

- c. *What are the skill development challenges in relation to the existing and future workforce (i.e., current employees need to develop new skills, specialized skills/degree/license are required, etc.) and how do you plan to overcome them?*

In the IT profession, it is not unusual for people to be hired on a project or contract basis, so the need to fill the positions as limited duration hires should not be exceptionally hard to overcome. However, training them to the agency's needs would challenge the existing IT staff while they are working on the database replacement project. To overcome this, we are hoping to continue our current LDs through the duration of the project to allow our senior staff to focus on the critical project work.

## **Critical**

### **2. Position Number Two: Medical Director**

- a. *Development plan for competency development (how are you going to build the bench strength for this position).*

With the inclusion of a policy option package for an Associate Medical Director (AMD) position to be permanently funded at part time going forward, we hope to build the capacity at this level of work within the agency, in addition to creating an option for physicians to continue their service in a different capacity, even if they are looking to reduce their hours.

- b. *What are potential recruitment/retention challenges for this position and how do you plan to overcome them?*

The person in this position is required to be a licensed physician in the State of Oregon, and must be willing to work part time. This is generally a different schedule than the work schedule for actively practicing physicians who are often in charge of setting their own schedules and are not under the direction of a non-physician supervisor or manager. With the inclusion of the AMD position, we hope to offer flexibility to allow for physicians who are wanting to move to a more part time schedule, but still contribute to the well being of patients across the state.

- c. *What are the skill development challenges in relation to the existing and future workforce (i.e., current employees need to develop new skills, specialized skills/degree/license are required, etc.) and how do you plan to overcome them?*

The length and intensity of training required to become a physician and the cost of that training mean that the labor pool of licensed physicians is quite small. Physicians are not trained as government regulators, but some physicians have additional degrees that may be relevant to the role (e.g. MPH, MBA, MHA). We hope to overcome these challenges by offering a flexible part time position that may appeal to a physician who may be burned out on direct patient care, but still wants to contribute to the betterment of patient well-being.

## Critical

### 3. Position Number Three: Investigations Manager

- a. *Development plan for competency development (how are you going to build the bench strength for this position).*

The OMB plans to continue to develop staff internally to build leadership skills, and recruit when appropriate to fill the position, as well as any additional vacancies that may be created in the event of an internal hire.

- b. *Gaps: what are potential recruitment/retention challenges for this position?*

The recruitment challenges are that this particular skill set (investigations in medical care) does not have a particularly deep pool in the general population, and so the need to recruit for leadership skills, investigations skills, team focus, and equity mindedness can be a tall order. For the past several people in this position, they have been promoted internally from an investigator position or a supervisory role within the agency. That may not be an option with the next iteration of this role.

- c. *What are the skill development challenges in relation to the existing and future workforce (i.e., current employees need to develop new skills, specialized skills/degree/license are required, etc.) and how do you plan to overcome them?*

Although we currently have investigators on staff, we have hired many of them within the last several years, and they are not likely to be ready to take on a leadership role. Our plan is to continue to develop staff internally, but also be prepared to widen our search outside the agency and the state if necessary to fill the role with the best possible candidate.

### Agency-wide plans for competency development

The OMB continues to be committed to developing staff for opportunities within the agency and within the enterprise of State government. Several of our investigations staff will be attending training from the Council on Licensure, Enforcement and Regulation (CLEAR) for a national certification. Other staff members in our Licensing section will be attending a Licensing Specialist training through the Administrators in Medicine (AIM). On the management team, our Legislative and Policy Analyst is currently completing Leadership Oregon, and our new Medical Director is currently enrolled in an MBA program with an educational subsidy from the OMB.



*What are the agency's plans to evaluate and revisit this plan to ensure the agency is on track (i.e. "The agency's leadership team will evaluate this succession plan quarterly and make adjustments as necessary")? Further areas to refine your evaluation strategies are included below.*

### **Overall Plan Review**

*How will the agency review the plan in its entirety (i.e. quarterly/annually and by whom)?*

The OMB's Executive Director, Human Resources Manager, and Public Affairs Specialist review the agency's succession plan annually.

### **Highly Critical/Critical Positions**

*Has the work itself changed, how the work is done changed, or were new programs added?*

The work of the Medical Director position has evolved using AI tools to assist in reviewing voluminous medical information. The work involved in developing the new IT database takes contributions from subject matter experts across the agency, which has impacted the workload. All of the agency's work is also being done with consideration towards the increase in national and international collaboration regarding the medical workforce, as a shortage of qualified healthcare professionals is an ongoing issue everywhere.

### **Competency Adjustment**

*How will the agency evaluate and adjust competencies?*

The agency continues to use the Performance and Accountability Feedback quarterly reviews to open conversations regarding goals and development opportunities with all staff. This has become our primary tool for assessing staff competencies and providing growth options.

### **Employee Goals**

*How will the agency evaluate employee goals (i.e., PAF guidelines to discuss employee interest and cross-training/promotional opportunities)?*

The OMB will evaluate employee goals through quarterly check-ins between managers and their supervised employees.

The OMB's Strategic Plan also sets targets for professional development opportunities for staff, and the management team is intentional in identifying opportunities and making those available for staff.

### **Recruitment + Strategies**

*What is the evaluation process to determine if the current and future recruitment and retention strategies are working and how will they be adjusted as needed?*

The OMB continues to work toward the Governor's expectations of a 50-day recruitment. Overall, the agency is at an average of 48 days to fill positions from the time they are posted. These numbers are somewhat skewed for 2024 due to the challenges faced from hiring a new

Medical Director who was not able to start in the position for approximately four months after accepting the agency’s offer due to contract issues with her previous employer. Additionally, the recruitment of Acupuncture Advisory Committee members has been challenging as a sub-committee of the Board and the processes involved in posting these positions.

In 2024 the agency has opened 17 requisitions, resulting in 14 hires.

We hope that the information gathered using the Gallup survey will help us to identify areas of focus in regard to retention and employee satisfaction. Additionally, our quarterly PAF meetings with employees provide an opportunity for more “real time” feedback from staff.

Adjustments to recruitment and retention strategies will be discussed and developed with Human Resources, the agency management team, and the Executive Director. As part of our Strategic Plan, these strategies are reviewed quarterly for progress toward stated goals.

**2024 Retirement Eligibility | One Year Forecast (Optional)**

*Utilizing the Workday report HCM Retirement Eligibility Summary, identify the number and percentage of your agency’s workforce that is currently eligible to retire and is eligible to retire within one year.*

Position	Eligible to Retire Now	Eligible to Retire ≤ 1 Year
Investigations Manager	1	
Admin Spec 1 (Licensing)	3	
Investigator 3	1	

Approximately 12% of our current workforce is eligible to retire (5 out of 42). There are no other current employees eligible to retire within the next year.

**2024 Action Plan | (Optional)**

*This section will help the agency outline the actions needed to align the agency’s strategic and succession plans. List the specific activities the agency will use, steps for completion and timeline to ensure agency’s performance. Agencies should include metrics where appropriate.*

**ACTIVITY #1:**

**Objective:** Institute an annual in-service day for each department or the entire agency, focused on team building and professional development.

**Targeted Completion Date:** October 9, 2024 (Completed)

**Intermediate Milestones:** Schedule time for staff meeting to ensure greatest attendance.

**Contingencies (if any):** n/a

**Narrative:** This first annual in-service day was amazingly successful and included training on communication skills as well as team building and a charitable group activity.

**ACTIVITY #2:**

**Objective:** Send at least six non-management staff members to a professional development course or conference.

**Targeted Completion Date:** 06/30/2026

**Intermediate Milestones:** Send at least two staff members to professional development each year.

**Contingencies (if any):** Subject to budget constraints and staff changes.

**Narrative:** All investigative staff attended training on trauma-informed investigations on October 17, 2024. The OMB’s Legislative and Policy Analyst (OPA4) will complete Leadership Oregon in December 2024. Two Investigator 3s will attend training from the Council on Licensure, Enforcement and Regulation (CLEAR) for a national certification in January-February 2025. Two Licensing Specialists (AS1s) will attend a licensing certification training through the Administrators in Medicine (AIM) in January-September 2025.

**Conclusion**

*Use this space to conclude any final thoughts about your succession plan. Explain how your plan supports the agency’s strategic plan, affirmative action and/or diversity plan(s).*

The agency’s Succession Plan works in conjunction with the Strategic Plan, Affirmative Action Plan and our DEI Action Plan. All of the action items from these various plans are reviewed with the management team periodically throughout the year to ensure we stay on track to meet stated goals and objectives. The OMB remains committed to ensuring optimal staffing and providing quality resources for staff to enable them to do their best work in support of our mission.