

**Succession Planning in Governmental Organizations:
Why Does It Matter?
What is the Role of Human Resources Personnel?**

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The retirement en masse of the baby boomer generation is a critical problem that will affect all government agencies within the next ten to fifteen years and few states are prepared to handle it. Today the baby boomer generation (persons born between 1946 and 1964) makes up nearly 43.6 percent of state government workforces (Murphy 2005). These individuals are highly qualified and have devoted long careers to public service, but there are not enough workers to replace them. Bob Lavinga, a client services manager in Wisconsin, believes that the retirement crisis will hit government first and hardest for two reasons. The first reason is that “public workers are, on average, older than private sector workers” and the second reason is that public workers are eligible to retire at an earlier age than private sector employees (2005, 8).

Although the baby boom retirement crisis is eminent, there is still time for government agencies, officials, and researchers to do something about it. To find suitable replacements for the wave of retirees, government agencies must engage in succession planning. Succession or workforce planning is “an ongoing process of systematically identifying, assessing, and developing talent to ensure the leadership continuity for all key positions in an organization” (Radtke 2001, 19). Government agencies that prepare and implement succession plans will be in a position to successfully manage the retirement crisis.

During a class presentation on January 24, 2005, Jeff Herring, the Director of the Department of Human Resources (DHRM) in Utah presented materials outlining the DHRM’s strategic plan. The plan highlighted current issues that the DHRM is investigating, including the aging workforce, baby boomer retirement, and succession planning. After the presentation, Mr. Herring left time for questions, and so I proceeded to ask him about the details of the state’s succession plan. I expected him to refer me to a report or study, but was intrigued when he indicated that Utah has no formal succession plan or procedure in place. A few weeks later, on

February 4, 2005, I attended a forum panel where an employee from both the Salt Lake City Human Resource Office, the Salt Lake County Human Resource Office, and the Utah State Human Resources Office indicated that although each of their Human Resource divisions recognized the need for succession planning, none of them had formal procedures in place.

The lack of succession planning is not uncommon in a majority of states. In a survey conducted by the International Public Management Association for Human Resources, only 37 percent of their members indicated that they had a formal workforce planning process in place (IPMA 2004, 1). The other 63 percent of the respondents indicated that they did not have any workforce planning process in place. In talking employees in the Human Resource Departments of several states I have similarly discovered that the majority of government agencies lack adequate succession plans to replace government workers. On February 11, 2005, I sent out an e-mail to the departments and agencies of Human Resources in eight different states with similar populations and budgets as Utah: West Virginia, South Carolina, Oregon, Oklahoma, Nevada, Mississippi, Kansas, and New Mexico. Human Resource personnel from Oklahoma, West Virginia, Kansas, South Carolina, and Nevada responded to my request with the following information.

In an e-mail dated February 28th, Doyle W. Fortney, Chief of the Oklahoma Office of Human Resources wrote “In the state of Oklahoma, OPM and several Agencies within the State are actively pursuing Workforce Planning. We are in various stages, depending upon the Agency and focus. To my knowledge, the area of succession planning is identified as a vital one, however, much remains to be done in establishing both structure and content.” From his response, it appears that Oklahoma, like Utah, recognizes the need for succession planning, but has a lot of work to do in formalizing it.

In a phone interview conducted on April 6, 2005, Dan Phillips, Department of Human Resources, Office of Personnel Services indicated that West Virginia is taking the first steps toward succession planning. Dan mentioned that West Virginia's first step was to compile statistical data of persons who are likely to become eligible to retire within the state's agencies. Dan stated that "new people do not have the skills needed to manage the programs" and so the West Virginia HR office's second step in succession planning is to devise some creative ideas to identify people with potential. However, Dan stated that although their office is working to develop ideas for succession planning, they "feel that no one is listening" and that the "political arm may not consider [succession planning] to be an important issue."

Kansas has invested much time and energy into studying the impact of retirees on state agencies, but has made little investment in forming a succession plan to replace those workers. In an e-mail response on February 21, 2005, Wilda J. Davison of the Kansas Department on Aging stated "The Kansas Department on Aging has had discussions about the baby boomers and the impact on our services," but mentioned that the state had done little work in the area of succession planning.

Frank Adams, Public Information Director for the South Carolina Unit on Aging indicated in a phone interview on March 25, 2005 that the state was focused on alerting people in local chambers of commerce, city governments, and state representatives of the need for succession planning in the state. He mentioned that the Unit on Aging functions under the Lieutenant Governor and that their focus has been on bringing people to the table to determine which issues are the most important and how to proceed. South Carolina's retiring wave of baby boomers is expected to have the "largest impacts on those industries and occupations that are

generally less subject to productivity-enhancing gains in technology,” such as educators and health care providers (Schunk 2005, 1).

Finally, Martin Hefner, a Research Analyst in Nevada State’s Research Division stated in an e-mail dated March 3, 2005 “there is no single, uniform plan in the State of Nevada regarding succession planning for its various agencies and departments.” However, Martin indicated that the Nevada Department of Personnel is “in the process of conducting a study on succession (workforce) plans and their application to Nevada’s government agencies.” The Department of Personnel established a Workforce Planning Committee in 2003 “to create a program for agencies to develop and replace key positions” as retirements take place. The Committee meets quarterly and is composed of ten to twelve members from different agencies within the Nevada government. The committee is working to create a “procedure manual” for state agencies to use as a tool for developing and implementing their own workforce plan.

The responses of these different state employees indicate that state agencies are aware of the need to engage in succession planning, but that they are either reluctant or unable to do so. Most of the individuals I spoke with told me that although they were anxious to implement succession plans in their states they lacked adequate funding and legislative support. Several of the states I examined have taken the first steps in workforce planning, but there is still much to be done. The first step agency officials should take to prepare a succession plan is to examine the literature that exists on how to create and implement a succession plan. By examining the literature, agency officials can begin to establish both the structure and the content of a succession plan.

Succession planning occurs as a series of steps or events that build on one another. Bob Lavinga provides a conceptual five-step process for developing a succession plan:

1. Analyze the organization's current workforce capabilities (e.g., the people and competencies available right now)
2. Project the organization's future workforce needs (people/competencies needed to do the work of the future)
3. Compare the current workforce to future workforce needs (i.e., to identify people/competency imbalances-both gaps and surpluses)
4. Develop HR policies, plans, and approaches to eliminate gaps and surpluses and therefore build the workforce of the future
5. Do it again and again. That is, put in place a permanent process to continually assess workforce needs and capabilities, identify gaps, and eliminate imbalances (2005, 8).

The Institute on Rehabilitation Issues report, *Succession Planning: Building*

A Successful Organization in a Dynamic Environment lists some practical elements to consider in developing HR policies, plans and approaches in workforce planning:

- Identify the competencies critical to the organization
- Detail what the organization wants from each level or position
- Describe what those functions will look like
- Provide a means to monitor and evaluate performance
- Define those means to support those functions, as well as the individuals in those functions, once the plan is in place (Radtke 2001, 19).

Creating a succession plan is simple in theory, but may be hard to put into practice for several reasons. First, the Human Resource offices in several states are not independent departments.

Human Resource offices placed under line departments face a greater challenge in carrying out strategic planning because they can become subordinate to the vision of the department head.

Succession planning is a strategic process that involves a long-term commitment to research and evaluation. Second, succession planning requires time and resources. Most of the Human Resource managers I interviewed indicated that they do not have the sufficient monetary

resources or available staff to carry out the long-term development of a succession plan. Third, succession planning is not a pressing issue in most state legislatures. State legislatures are reluctant to adequately fund and support succession planning because the government workforce is relatively stable and legislators feel that the retirement crisis is still many years in the future. Consequentially, the International Public Management Association for Human Resource's 2004 study found that workforce planning is not a common practice in many state governments. Some of the reasons cited by those with no immediate plans to develop a workforce plan follow:

- This has not been a priority with City management to date
- It's not that it would not be great to have one, but we just don't have the staff to create one at this time
- It is not considered a high profile concern of management
- Developing a workforce plan has not been viewed as a pressing issue. We have always "gotten by" with dealing with replacements and backfilling as the need arises
- Over the past decade, it has not been difficult for the City to find qualified pools to fill most of the City's positions. However, we realize that this will change as the local and regional demographics change, so we are considering succession planning
- Normal recruitment/retention efforts are expected to maintain an effective workforce
- The HR function has provided a proposal for Workforce Planning to the Executive Staff for their consideration, but it was never approved for HR to proceed with developing anything. We are planning to re-submit a proposal in the near future

(IPMA 2004, 3-4)

A succession plan should be customized to the needs, vision, and mission of the particular agency and should form a part of its strategic goals. Additionally, a succession plan must meet the needs of and be accepted by all members of the organization. To ensure that the plan is implemented successfully, the agency should

- Have commitment and support from top management
- Be guided by Human Resources

- Be embraced by line staff
- Focus on shared responsibility for employee development
- Include individual development plans for each employee focused on development opportunities with the greatest impact
- Ensure that employees take ownership of their development, with strong management support. (Radtke 2001, 20).

The National Association of State Personnel Executives (NASPE) conducted a survey of the fifty states to identify where they are in their workforce planning efforts. Thirty-five states responded to the survey and provided helpful information. When asked what level of executive management support the state had for its workforce planning only fifteen states indicated that the governor's office or state agency directors supported their efforts. The other twenty states indicated that they garnered most of their support from agency HR and/or EEO directors. This data indicates that many states lack adequate support and commitment from top management to develop workforce plans.

A succession plan is an element, not the core of an organization's overall strategy and objectives. As Lavinga states, "Planning should be directly linked to the organization's strategic goals and objectives... be driven by organizational strategy...and directly involve line managers-early and often" (2005, 8). Succession planning that evolves out of an agency's strategic goals and objectives and garners the support of line management will most effectively create a process for ensuring a self-renewing workforce.

The steps to creating a succession plan do not have to be completed at once. In a 2002 report, Mary Young, a research consultant for the Center for Organizational Research, found that jurisdictions that used workforce planning most effectively focused their resources. Young stated

"...greater aging workforce challenges to not necessarily require bigger organizational responses. In fact, identifying the most strategic trouble spots and then selectively addressing them appears to be more effective- and certainly more doable- than increasing

the scope of the organization's response in proportion to its aging workforce challenges" (2002, 5).

Government organizations with small budgets and limited staff should actively participate in creating a plan for those service-related positions within their agencies such as secretaries, teachers, registered nurses, and public administrators that will be hardest hit and hardest to fill by the retirement crisis (Schunk 2005, 2).

Finally, as government agencies prepare succession plans, it is important that they consider the changing demographics, values, expectations, and orientation of today's workforce. First, there are an increasing number of women in the workforce. Patton, et. al. notes that this development "has obvious implications for the work-life programs and the need for flexible work schedules and options to deal with child care responsibilities" (2002, 31). Second, minorities make up an increasing percentage of today's workforce. Finally, the "jobs of the future are likely to require increasing levels of technical skill and competencies" which agencies must account for in the recruiting and training elements of their succession plan (Patton 2002, 32). Additionally, Radtke, et. al. indicate that today's workforce "may be more inclined to move from job to job and be less tolerant of organizational demands" than their predecessors (2001, 13).

Government employees in State Human Resource departments must understand the steps and process necessary to create and implement a succession plan. Additionally, these individuals should look for ideas and innovation in succession planning by analyzing the succession plans developed by other state agencies and private businesses. A review of these succession plans, their advantages and their limitations follows.

In his article, Lavinga states that "most agencies must come to grips with the fact that some of their most basic policies, processes, and procedures are years out of date" (2005, 8). He

then lists several approaches that some government agencies are using to modernize their human capital practices:

- Aggressive marketing of public service as a unique opportunity to do important work that can't be done anywhere else.
- Online applications or paper applications that are more user-friendly and easier to complete.
- For hiring managers, online systems that enable them to directly access candidate data bases and even "order" lists of qualified candidates
- The ability to make "on-the-spot" job offers
- Hiring and retention bonuses, plus bonuses for current employees who refer applicants who are hired
- Formal processes that identify critical employee competencies and link all HR systems (including compensation and advancement) to these competencies
- Systems (online if feasible) that enable employees to assess and compare their competency levels to organizational outcomes and assess these programs' returns on investment

(Lavinga 2005, 8)

An advantage to modernizing employee applications and hiring systems is that HR departments can process information at a faster pace. Online applications and computer databases allow HR professionals to process more information than they did in the past. A limitation of modernization is that HR professionals may focus on the paper data and information about the job candidate more than they focus on the candidate himself/herself.

Good workforce planning also requires agencies to produce data by conducting studies, analyses, and research of their future employment and managerial needs. With this data, agency employees are equipped with "hard numbers and insightful analysis...to get the attention of decision-makers" to allocate the necessary funds for effective implementation (Lavinga 2005, 8). Government agencies that engage in research efforts will be equipped with data to highlight the

need for succession planning that exists in the state and garner legislative support to allocate the funds. For example, West Virginia is working to create a data set of the state's future employment needs. In his interview, Dan Phillips told me that West Virginia HR employees have been concentrating their efforts on compiling data on upcoming retirements and projecting a list of government retirees within the next ten years. Mr. Phillips will present this data set to the state's legislators in hopes of persuading them to commit resources to developing a statewide succession plan.

State HR officials can realistically project their state employment needs and call attention to the retirement crisis by preparing accurate numbers and statistical analyses. On the other hand, conducting in-depth research on state employment needs requires time and resources that are often scarce commodities in Human Resource offices. In the future, state HR offices may consider contracting out succession planning research to Universities or nonprofits specializing in public policy research or aging issues.

Some public organizations use long-time or retired employees to train new workers as part of their succession strategy. Muladore notes that

“Some organizations are utilizing retirees on a part-time basis to augment the loss of skilled employees while new employees can learn the necessary skills. In others, such as Amerikam Inc., in Grand Rapids, Michigan, retirees are being assigned to work on a special project while teaching new employees the skills necessary for that job” (Muladore 2005, 10).

For example, some university administrators are encouraging academic deans to “consider offering bonuses to certain faculty to remain at the university, even if they have reached normal retirement age” to counter the problem of losing organizational memory (Curran 2003, 139).

This is done to avoid hiring exclusively newly graduated applicants, to prevent the same problem (retirement en mass) from occurring again, and to ensure a balanced age mix of university

faculty. Additionally, an article in the New York Times entitled *More Help Wanted: Older Workers Please Apply* (March 23, 2005) suggests that even private business such as Home Depot are looking to hire and retain older workers because of their lower turnover rates and higher work performance. These organizations recognize the benefits that older workers can bring to the workplace and use their expertise and experience to train new employees.

One advantage to using long time or retired employees to train new workers is that they possess institutional knowledge. Retired workers have expertise and experience to share with new and upcoming managers that is difficult to teach through traditional training methods. Additionally, retired workers can give personal attention and grooming to new managers and help them progress through the learning curve. A disadvantage to using retired workers to train new employees is that it may not be cost effective. By retaining long time workers as well as hiring new workers public organizations can potentially double their salary expenses. This cost is not feasible in the public sector because most organizations operate on tight and legislatively controlled budgets.

The Institute on Rehabilitation Issues conducted a survey of state agencies succession plans to determine the types of training and development programs these agencies employ as part of their succession plans, as well as other outside resources that they use to develop their staff's management and leadership skills (Radtke 2001, 91). Twenty-four states responded to the survey and their ideas offer some creative strategies.

Washington State developed a mentoring program designed to partner experienced workers (mentors) with beginners (protégés). They developed a "mechanism to screen, select, and assign mentors/protégés, provide orientation and training to mentors and protégés four times a year, and gather data about program effectiveness" (Radtke 2001, 95). This program employs

the expertise of agency employees in different departments of the state government. Likewise, “mentors and protégés need not come from the same agencies” (Radtke 2001, 95). This innovative program allows experienced workers to mentor new hires and encourages inter-office promotion. However, because the program encourages public sector agencies to promote only those individuals who have been mentored and trained within the organization, qualified job candidates from outside the organization may not be given equal consideration for the job.

Ohio developed a succession management program called Leadership Development (Radtke 2001, 96). Participants in this program draft a personal development plan and then receive orientation and direct feedback from their supervisors. The HR department administers the program and assists participants who want to return to school, or participate in agency meetings and activities to expand their knowledge, skills, and abilities (Radtke 2001, 96). The goal of the program is to make learning fun. Participants are also encouraged to complete twelve hours of recertification management training each year. Through continuous learning opportunities, employees can individually develop skills and abilities that apply to their particular position or job requirement. On the other hand, public agencies must make sure training and continuous learning programs do not impede their employees from getting the job done.

North Carolina developed a pre-supervisory assessment and training institute to assist internal candidates to “investigate their own interest and ability for management positions, to allow the agency to assess their leadership potential, and to provide job ready personnel for leadership positions” (Radtke 2001, 97). The institute meets four or five times a year. A benefit of the institute is that both managers and employees can work together to address future management needs and to assess the skills and knowledge necessary to fill those positions.

However, it is again important for public agencies to remember that they must give equal consideration to all job candidates, even those from outside the organization.

During my interview with Dan Phillips I found out that West Virginia is in the planning stages of developing a program to recruit qualified applicants through a yearlong internship opportunity. The program's goal is to reach out to individuals in the managerial field and identify people with potential. The program administrators would actively recruit Master's students in Public Administration, Social Work, or Health to intern in a government managerial position for a year. The HR office would manage the trainees and mentor them through a process of job rotation within their department. These individuals would be compensated like regular employees and at the end of their internship they would get special consideration for open positions in the state. The West Virginia HR office proposes to start with a cohort of twenty-five members and expand as the need arises. One benefit of this program is that it seeks out individuals who are interested in and have been trained as managers. Additionally, job rotation enables these individuals to receive on the job training and experience in several different managerial functions. However, job applicants who have passed through the state's training program cannot legally receive special consideration for the job because the state (or government entity) has an obligation to provide equitable consideration of all qualified candidates.

Finally, Idaho, like several other states is implementing the nationally accredited Certified Public Manager (CPM) training and development program to help public managers "acquire and apply the best practices and theory to their management behaviors and strategies" (Idaho DHR 2005, 1). The CPM program is designed to accomplish several purposes. First, the program works to strengthen organizational performance by improving the effectiveness of

Idaho's public managers. Second, the program provides a course of study through which Idaho's public managers can acquire new principles and skills to use in their positions. Finally, the CPM program is designed to establish an objective assessment of a public manager's professional knowledge and performance and establish a standard by which public managers can be recognized. The CPM program provides a useful network for managers in the public sector to learn new skills and coordinate with other public managers. The program also enhances employee retention by encouraging employees along their career path. Although it has its benefits, the CPM program is not specifically tailored to address the needs of the retirement en masse of the baby boomers. The program does not adequately provide training for individuals who are not currently managers in the public sector and does it not encourage public agencies to project and prepare for their future employment needs.

Private sector organizations are also engaged in succession planning, and many companies have created innovative plans for workforce development. Dow Chemical Company encourages its long-time management directors to actively participate in succession planning. These individuals "must give up management positions at age 60 or five years after their last significant promotion, whichever is later. They can remain on the board of directors until 65" (Cutting Edge Information 2002, 5). During this five-year period, these management directors are relieved of their frontline duties so that they can actively participate in recruitment, training, mentoring and development of future and current employees. In the public sector, merit employees may inhibit the application of this idea because those individuals typically have a right to their job until retirement. On the other hand, with an increasing number of at-will employees government agencies may be able to encourage managers to give up their managerial positions before they retire in order to train their own replacements.

Delta Air Lines focuses its efforts on internal development. The organization's Human Resource Planning (HRP) Process calls for "leadership potential assessments for all employees working at the managerial level or above" and uses this data to form promotability codes (Schettler 2003, 59). An executive council then meets twice a year to review this information for positions at the director level and above. During 2001-2002, Delta filled sixty-two percent of the twenty-one vacancies at the director level or above using the HRP process (Schettler 2003, 59). Government agencies should make efforts to assess the managerial potential of their current employees, but at the same time remembering that, unlike private sector business, they have a duty to keep their promotion procedures open to all qualified applicants inside or outside the organization.

Assessment centers are another popular succession planning resource because they allow employers to mimic the exact job conditions that candidates will be required to meet. Assessment centers allow employers to "identify specific employee weaknesses and allow training to be tailored to individual needs" (Schettler 2002, 55). Capital One is a rapidly growing organization that uses assessment centers to help them focus on and develop high-potential people who will help the company grow. They also offer an academic curriculum in partnership with the University of Richmond in which "fifty percent of a student's participation in the program takes place during regular business hours" (Delahoussaye 2002, 32). Assessment centers can be a valuable tool to help employees determine if their skills and interests match the qualifications of the job. However, assessment centers are very costly and may not be a high priority in the public sector.

Intel employs a decentralized planning strategy where each business unit is responsible for managing and maintaining its own pool of candidates. One unit uses a "performance-to-

values matrix to evaluate candidates prior to the formal succession planning meeting” (Delahoussaye 2002, 34). The individuals are evaluated on how they demonstrate the Intel values of professional experience and meritocracy in their daily performance. Managers provide feedback and help the individual identify their top areas for development. This strategy works well in organizations where employees work in teams or units. Public sector agencies such as the police force or fire department could benefit from a performance to values matrix to allow each individual unit to manage and maintain a pool of candidates. However, the pool must be properly monitored so that promotions and hiring’s remain open to the public and all qualified applicants.

Another company, Vision Service Plan works to actively promote community involvement. Workers are allowed up to eight hours of pay for volunteering in their communities in an effort to promote philanthropy in the corporate culture (Delahoussaye 2002, 35). Volunteer opportunities give workers a breadth of knowledge and experience not easily obtainable in the workplace and help the organization ensure the continuity of philanthropic leadership. Public organizations such as universities and community colleges often encourage their faculty and staff to participate in volunteer experiences. Some universities list volunteerism/service hours as a qualification for tenure. Although these experiences are valuable to the individual, as well as to the community, public organizations must be sure that employees have enough time and incentive to accomplish their job duties and get the work done.

Finally, Bill Maxwell, senior vice president of HR for Cendant Mobility uses dialogue and academic literature to help employees gain new perspectives on management theory and learn from their peers (Delahoussaye 2002, 36). Maxwell circulates an article on classic management theory to employees in each facility, and follows up with “a round-table discussion

of the key concepts and learning points of the article” (Delahoussaye 2002, 35). This process helps employees understand how different theories apply to the management of people in the workplace and develop new outlooks on their leadership styles. Maxwell’s idea is simple and would be easy to apply in most public agencies. Managers could use academic literature to educate up and coming employees and facilitate conversations about advancements in their field. One limitation of this strategy is that it may be difficult to encourage all employees to participate and come prepared to discuss key concepts.

In conclusion, succession planning is a necessary but unexplored resource for most public organizations. Human Resource professionals throughout the country are aware of the need to develop a succession plan, but lack the resources and legislative support to do so. To be implemented successfully, succession planning requires research, strategic planning, and the support of top management. Some states and many private businesses have developed feasible alternatives for creating a succession plan to suit the needs of their organizations. Succession planning in the public sector involves a combination of strategies designed to prepare and find qualified replacements for government jobs. The retirement en masse of the Baby Boomer generation is coming and without succession planning efforts today we will not be prepared to face it tomorrow.

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