Preparing for Tomorrow: A Case Study of Workforce Planning in North Carolina Municipal Governments*

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Local governments are poised for a workforce crisis. Many will be faced with the impact of a mass exodus of baby boomers from their ranks at the same time the skills and knowledge required to continue to provide quality services increases. Governments will compete with private and non-profit organizations, as well as with each other, for talented workers. However, this crisis is likely to be felt by governments first because of their older employee base and high demand for knowledge workers. Individuals with needed skills and knowledge will become harder to recruit and retain, especially if governments are not clear about the skills they seek. Workforce planning can help governments act and perform strategically in the face of increasingly complex governmental demands made even more challenging by this impending human capital crisis. The 2002 International Personnel Management Association report, *Workforce Planning Resource Guide for Public Sector Human Resource Professionals*, found that "Workforce planning is the most critical human resource management challenge in the public sector today." This paper examines the state of workforce planning in North Carolina municipalities. Survey data from medium and large size municipalities in North Carolina with populations over 15,000 is analyzed to determine the current state of their workforce planning efforts. An overview of current practices, identified needs, pressing concerns, and primary barriers to implementation and success are presented.

The impending exodus of baby boomers from the nation's workforce, coupled with the increasing competencies and skills required of public-sector employees to provide quality services, sets the stage for a key challenge that governments will face in the coming years. They will compete with private and nonprofit organizations, as well as one another, for talented workers.

In short, the nation is poised for a workforce crisis, and governments are likely to feel the crisis first because of their high proportion of older employees and their high

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demand for knowledge workers. People with the required skills and knowledge will become harder to recruit and retain, especially if governments are not clear about the skills that they seek. Workforce planning can help governments perform strategically in the face of increasingly complex governmental demands made even more challenging by the impending changes in and demands for human capital.

Governments must have the resources to achieve the goals and objectives outlined in their strategic plans. Moreover, simply continuing basic service provision requires resource planning that incorporates and addresses changing demographic and social demands. Techniques such as performance budgeting help governments plan for and track the level at which they are accomplishing their goals.[1] Just as organizations need to determine if the appropriate financial and capital components are in place for achieving organizational objectives, they need to consider whether the appropriate human capital is in place. Identifying a funding source for a position is not enough. Workforce planning enables local governments to determine their need for human resources to meet their objectives, and the availability of those resources.

"Workforce planning" is a process designed to ensure that an organization prepares for its present and future needs by having the right people in the right places at the right times. This article examines the importance of workforce planning for governments. It addresses how national demographic trends are creating a workforce crisis and highlights the particular challenges that this crisis will create in the public sector. Further, the article discusses national workforce-planning trends and describes practices of North Carolina local governments. Survey data from medium and large size municipalities in North Carolina with populations over 15,000 (n=50) is analyzed to determine the current state of their workforce planning efforts. An overview of current practices, identified needs, pressing concerns, and primary barriers to implementation and success are presented.

Importance of Workforce Planning

Strategic planning at the local level is becoming more common. A recent study of medium- and large-sized North Carolina municipalities found that 100 percent of respondents were conducting strategic planning in some form.[2,3] Commonly these plans involve the creation of an organizational or governmental mission statement, identification of core values, and specification of organizational goals by the organization's stakeholders.[4] To accomplish these goals and directions, governments must properly align their financial and human resources.[5] Workforce planning creates a systematic assessment of the content and composition of a government's workforce to determine what actions the government needs to take to respond to current and future demands to achieve organizational goals and objectives,[6] also discussed as Human Resource Planning (HRP).[7] As will be discussed later, through this process organizations work to ensure that their staffs are in the right place and have the right skills to do their jobs, core to this concern are issues of retention, recruitment, analysis and training. Human Resource departments are becoming more strategic players

within governments, as part of this movement planning activities are crucial to enhancing the strategic focus of both the department and the entire organization.[8,9]

In much the same way that financial issues are not the sole responsibility of the finance office, workforce planning is not the lone responsibility of the human resource department. Human resource staffs are key players in supporting and assisting the development of a workforce plan, but the ownership of workforce planning belongs to all managers, top administrators, and governing boards.[10]

Why Should We Care About Workforce Planning?

Workforce planning is important because, simply put, the numbers do not lie. The large number of aging baby boomers in the workforce considered in relation to the much smaller number of younger workers available to replace them sets the stage for a crisis.[11] A recent *Harvard Business Review* article notes, "The most dramatic shortage of workers will hit the age group associated with leadership and key customer-facing positions."[12] Many governments expect retirements of 50 percent or more among their

Figure 1: Percentage Change in Population by Age Group, 2000–2010 (Estimated)
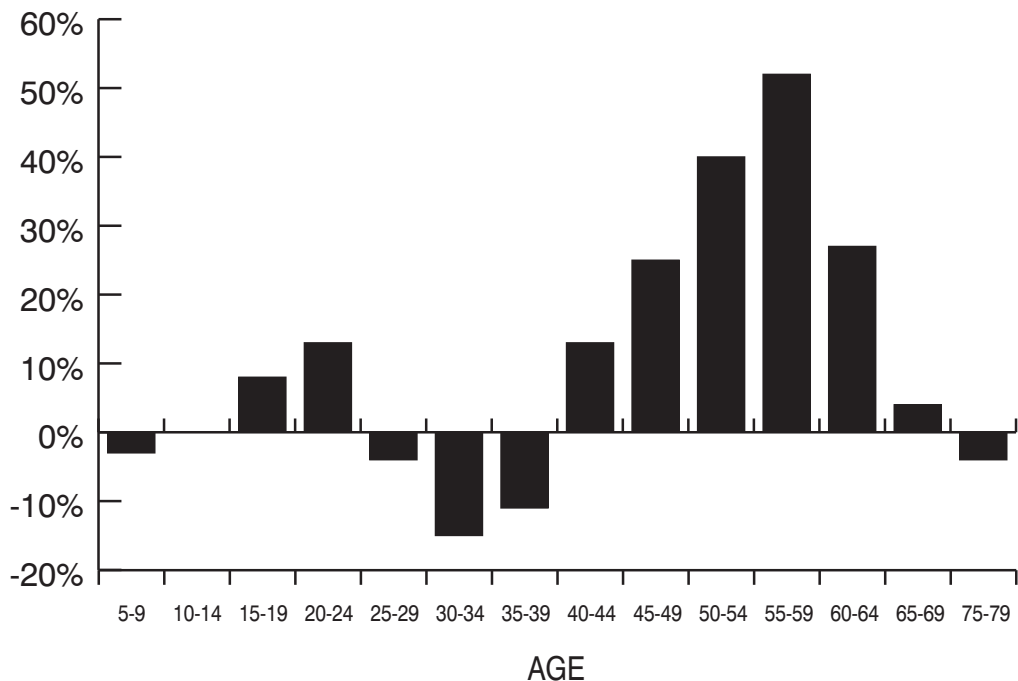
Source: From Mary B. Young, The Aging-and-Retiring Government Workforce: How Serious Is the Challenge? What Are Jurisdictions Doing about It? 31. Report sponsored by CPS Human Resource Serv. (Burlington, Mass.: Ctr. for Org. Research/A Div. of Linkage, Inc., 2003), available at www.cps.ca.gov/AboutUs/documents/CPS_AgeBubble_FullReport.pdf (last visited Oct. 31, 2006). Reprinted by permission.

senior managers in the next 5–7 years.[13] Turnover without planning can lead to increased costs, lack of continuity, and immediate negative effects on organizations.

Given the current demographics of the national workforce, the potential for turnover is great. Baby boomers (people born between 1946 and 1964) now make up 45 percent of the workforce, and "matures" (people born before 1946), 10 percent. The proportion of older workers (defined as those fifty-five years old and up) is projected to increase an average of 4 percent per year through 2015.[14] The rapid increase of people in the workforce who are ages 45–69 has been referred to as the "age bubble" (see Figure 1).[15] As the population ages, employers will have to determine how best to replace the growing number of retiring workers from a much smaller pool of rising workers.

## High Stakes and Pressing Demands for the Public Sector

Stakeholders at all levels of local government may find it more difficult to lead and govern their communities and serve their citizens as they face the added challenge of large retirement numbers in the next decade.[16] The demographic transitions that are occurring nationwide pose particular challenges for the public sector. The average age of public workers is higher; the levels of specialization of knowledge, skills, and training are greater; and access to available resources, such as training funds, recruitment bonuses, and financial incentives, often is more constrained.

Regarding relative ages, on average, 46.3 percent of government workers are forty-five year years old or older, whereas in the private sector, just 31.2 percent fall in this age range.[17] Federal, state, and local governments will face a great challenge in the next decade as they strive to replace these retiring workers.

The percentage of older workers in the government workforce increased more than the percentage of older workers in the private sector did between 1994 and 2001. Although the local government numbers are slightly less dramatic than the federal government (a 19.5 percent gap with the private sector), they still signal that local governments will likely face workforce retirement issues sooner than their private-sector counterparts.[18]

Regarding greater levels of specialization, as a large percentage of the workforce prepares for retirement, federal, state, and local governments will have to replace a greater percentage of knowledge workers than the private sector will. These knowledge workers require specialized training and education that enable them to fill roles such as health care worker, legal professional, scientist, engineer, educator, and manager.[19] More than 50 percent of all government jobs are in occupations that require specialized training, education, or job skills, compared with 29 percent in the private sector.[20] Occupations that require specialized education, training, or skills are dominated by older workers in the public sector. Therefore, finding skilled replacements for government employees will be made difficult not just by the demographic challenges of aging workers but also by the nature of the work performed by these workers, and by competition for younger workers from other sectors.

Figure 2: Younger and Older Workers by Level of Government
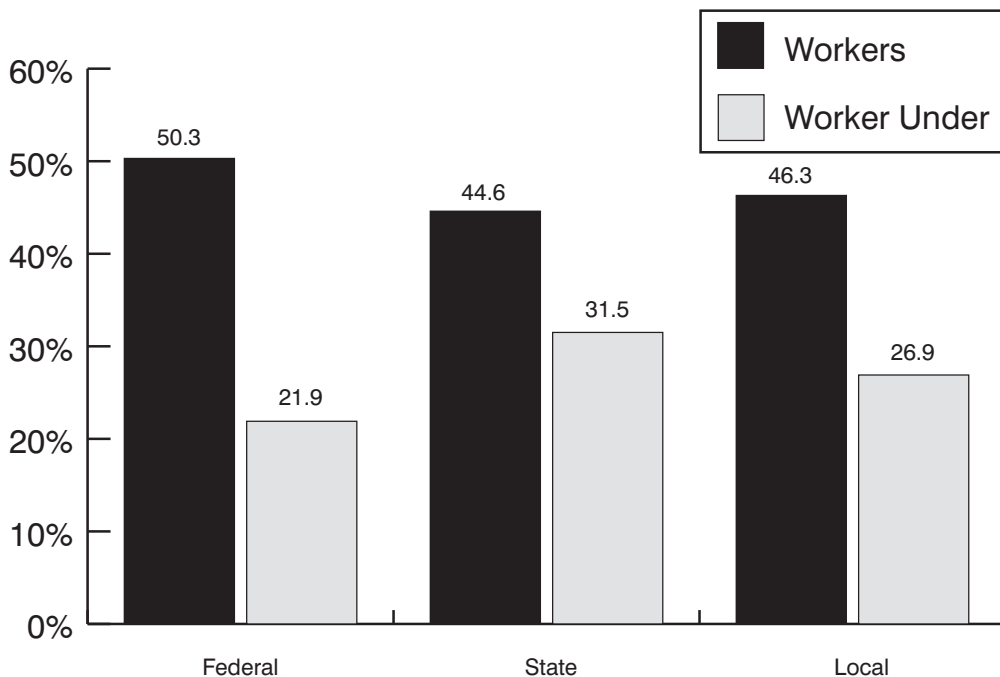
Source: From Craig W. Abbey & Donald J. Boyd, The Aging Government Workforce 4 (Albany, N.Y.: Nelson A. Rockefeller Inst. of Gov't, 2002), available at http://rfs.rockinst.org/exhibit/9006/

Full%20Text/AgingGovernmentWorkforce.pdf (last visited Oct. 31, 2006). Reprinted by permission.

Training budgets have faced many cuts and freezes that have hampered government's ability to prepare future leaders for advancement.[21] "Recession[s] in the 1980s and then the early 1990s were textbook examples of how state and local organizations drastically cut training in order to meet emergency budget cutback targets. Consequently, training was hard-pressed to maintain any continuity, much less identity." Despite this traditional and lasting challenge, "public sector organizations have increasingly placed more emphasis on training and development. Surface acceptance has progressed to increasing commitment to training and development programs by many private and public sector organizations." Nonetheless, the public sector lags. "As an industrywide survey taken in the late 1990s reveals about plans for training budgets, the public sector is still 'trailing edge' compared to the private sector, but at least 85% of the agencies surveyed were planning on maintaining or increasing funds."[22]

Factors that exacerbate the situation are past trends and employment practices, such as periods of rapid growth, downsizing, imposition of hiring freezes, and offering of early retirement incentives. Public employers also are hampered by the declining appeal of public service and continued competition for talent.

On the bright side, many experts believe that a few moderating variables will soften the blow of an aging public-sector workforce. First, the declining value of

retirement investments and the rising cost of retiree health benefits may influence retirement-eligible employees to continue working.[23] Second, the recent economic downturn actually increased the appeal of government employment because of its relative job security. Finally, although it is too early to measure the full impact of large-scale disasters such as 9/11 and Hurricane Katrina, they have highlighted the vital role that government plays in serving and protecting citizens and thus may have made public service careers more attractive.

Workforce Planning: An Important Tool

Workforce planning is not a panacea for the demographic changes that governments will face, but this crucial tool allows governments to be better prepared and more responsive. Also, it helps align current and future workforce needs with the organization's strategic objectives, helps leverage human resource practices to affect performance and retention, and increases opportunities for current and future workers. Workforce planning or Human Resource Planning is a means to achieve a competitive advantage through the effective use of an organization's human resources (i.e. Strategic Human Resource Management).

Aligning needs with objectives.

A transition is occurring from traditional personnel administration to strategic human resource management (SHRM). Tompkins (2002) identifies alignment of personnel policies and practices with an organization's strategic objectives as the core requirement of SHRM.[24] Workforce and succession planning are the tools that allow organizations to adapt to a changing environment, build human resource capacity to support strategic initiatives, and support a specific business strategy[25]. Pynes (2004) supports this view, stating that "workforce and succession planning refers to the implementation of human resources activities, policies and practices to make the necessary ongoing changes to support or improve the agency's operational and strategic objectives."[26] Through using workforce and succession planning, organizations are able to align their human resources with the challenges and opportunities found in the external environment, while providing the human capital needed to achieve the organization's goals.

Leveraging practices. Workforce planning helps focus a government's workforce investment on employee training, retraining, career counseling, and productivity enhancement, while ensuring that staff development efforts fit within the available budget. It also can help maintain and improve diversity, cope with effects of downsizing, and mitigate effects of employees leaving the organization.[27]

Increasing opportunities. Two major benefits of workforce planning are increased opportunities for high-potential workers and enlargement of the talent pool of promotable employees. Workforce planning can provide clear avenues for employees to pursue their career plans. Such avenues will help attract and keep valued employees, and that in turn will ensure a continuing supply of capable successors for key positions.

Summary. A well-developed workforce plan integrates training and development activities to provide a continuing supply of well-trained, broadly experienced, well-motivated people who are ready and able to step into key positions as needed. Also, it determines the key skills and characteristics needed for recruitment and selection. Having a plan can increase staff retention, tailor training goals and needs, provide leadership opportunities, clarify hiring priorities, increase employees' satisfaction, enhance employees' commitment to work and the workplace, and improve the organization's image.[28]

Status of Workforce Planning at Federal, State and Local Levels

Although increased attention and dialogue have been focused on workforce planning, a proportional increase in action and implementation has not occurred. The following summarizes what is happening in federal, state, and local governments.

At the federal level, the Government Accountability Office has drawn attention to the risk faced by the nation's government because of its lack of strategic human-capital planning.[29] Federal agencies have been required to undertake some human-capital planning as part of the Government Performance and Results Act, but meeting this requirement often falls far short of the detail and the focus needed in a full workforce plan. The level of sophistication and the comprehensiveness of workforce planning efforts vary across federal agencies.[30] Agencies such as the Department of Energy, the Department of Labor, the Office of Personnel Management, the Social Security Administration, the Department of Transportation, and the Department of Veterans Affairs have been identified as having promising practices in place.[31]

Workforce planning activities have been increasing on the state level, though not on a scale appropriate to address the looming changes. In 1998 the majority of the states did no workforce planning, and only five had implemented a comprehensive, formal plan. By 2005 more than half of the states had workforce plans in place.[32]

Among local governments, many cities and counties have not invested in formal workforce planning.[33] Only about 20 percent of the cities in 1999 and 19 percent of the counties in 2001 reported that they conducted governmentwide formal workforce planning.[34] A 2004 survey by the International Public Management Association for Human Resources (IPMA–HR) found that only 37 percent of the responding members had a workforce plan. More than 50 percent of the respondents represented local governments. Among those indicating that they were developing a workforce plan, there was substantial variation in where they were in the planning process. Only 6 percent reported that they had had a plan in place for more than five years.[35] This finding of a low number of local governments performing workforce planning is consistent with the findings of other studies.[36]

Although few local governments have formal workforce plans, the research reported in this article found that, as part of their human resource activity, many are undertaking practices or strategies that are components of workforce planning and provide a starting point. Similarly to Drennan's, 2005, finds that municipalities were

understanding elements of the strategic planning process without identifying them as such.[37]

Status of Workforce Planning in North Carolina

Given the strategic advantage that workforce planning has been argued to have, the question remains of how common and sophisticated are current practices within local governments. This research examined not just formal plans under the concern that formal workforce planning may be limited while associated practices may be in place. To better understand the state of workforce and succession planning and associated practices a survey of medium and large North Carolina municipalities with populations over 15,000 was conducted in 2004 (n=50).[38,39] The survey consisted of fifteen open and close-ended questions. Survey questions were adapted from a 2001 Maxwell School of Citizenship and Public Affairs "Government Performance Project" survey; additional questions were included based on recent workforce and succession planning literature. Questions were included on major elements of workforce and succession planning as well as barriers and challenges to the process.[40] The initial survey instrument was pre-tested with two North Carolina county human resources departments. Based on feedback received, minor revisions were made.[41]

Of the 50 North Carolina municipalities surveyed 30 responded, resulting in an overall response rate of 60 percent.[42] Only 10 percent of survey respondents reported conducting formal workforce planning, but 30 percent reported doing informal or

Figure 3: The Nature of Workforce Planning Efforts in N.C. Municipalities (n=30)
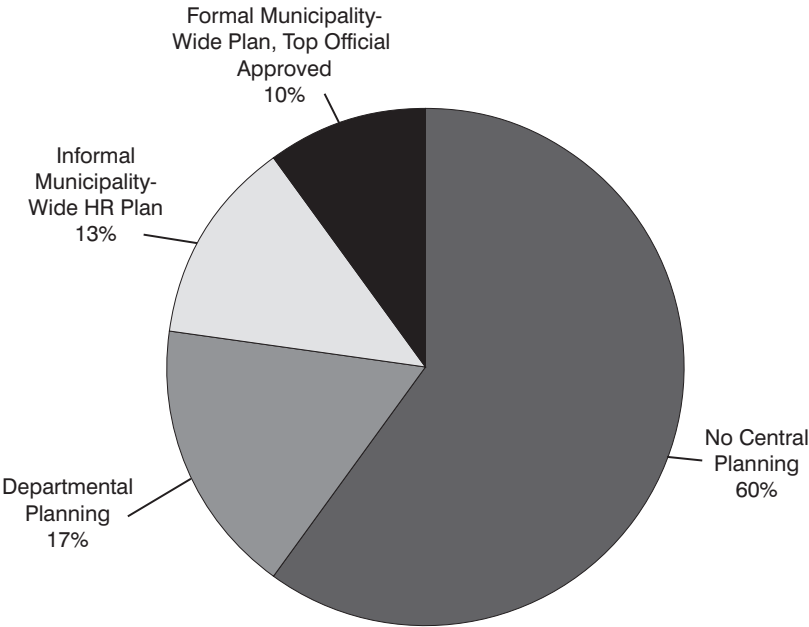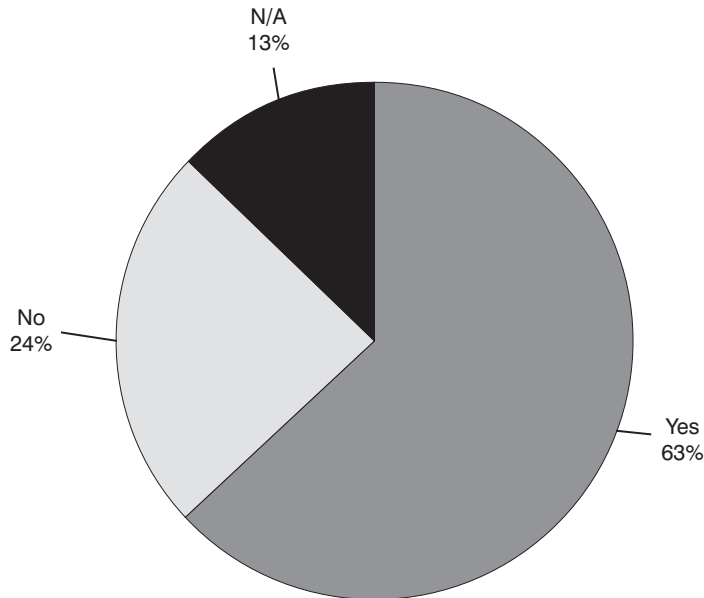
department-based planning. A majority of respondents (60 Percent) reported that they were not engaged in any type of central workforce planning. These proportions are consistent with national results (see Figure 3).[43]

Selden and Jacobson, 2007 argues that many cities do not engage in formal workforce planning because they do not identify it as an area they need to invest in.[44] This contention is not true in North Carolina, where, although only a small percentage of municipalities conduct workforce and succession planning, most identify it as a need (see Figure 4).

Identification of a need for planning is a positive sign. However, there is no guarantee that those who highlight this necessity will in fact create and implement a workforce plan. The majority of respondents to this survey reported that they anticipated developing both a workforce plan and a succession plan in the next three years. Despite this encouraging indicator, about 25 percent of survey respondents indicated that they did not intend to develop a workforce or succession plan.

Examining the Components of Workforce Planning

In order to understand the current state of workforce planning in North Carolina municipalities results are reviewed around the major phases, or steps, to the workforce planning process. Through this examination it becomes clear that despite the low numbers of municipalities engaging in formal workforce planning, many are currently undertaking elements of the planning process.
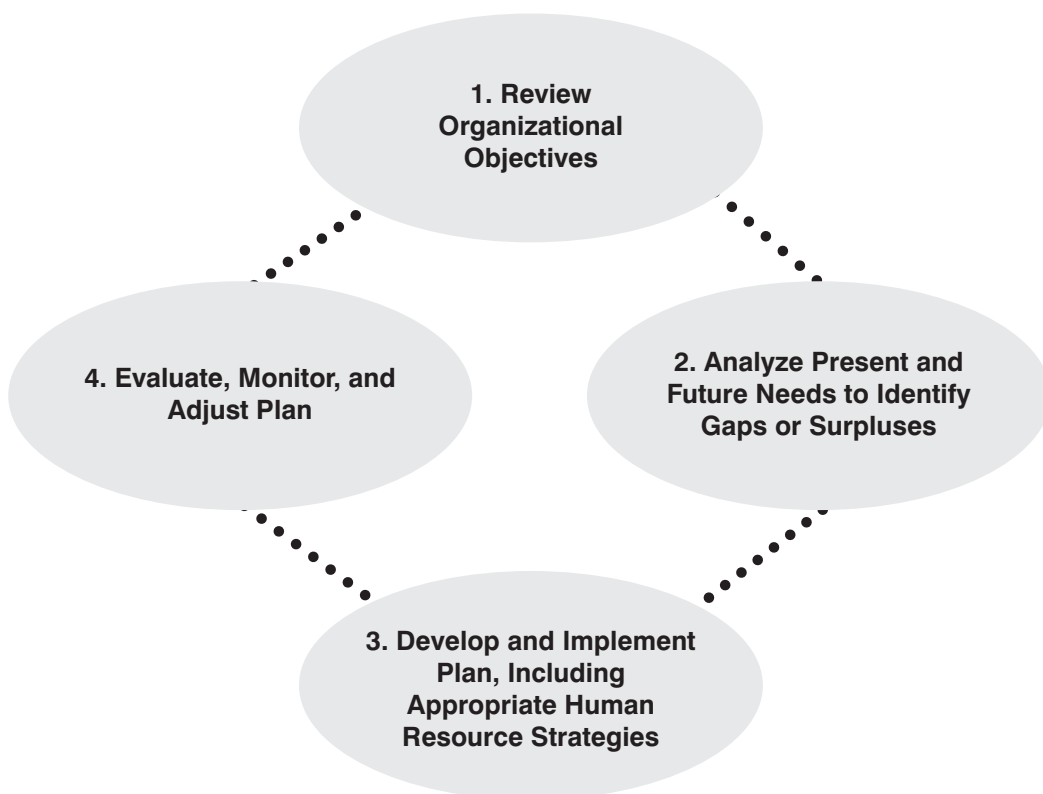
A Workforce Planning Model

Organizational success depends on identifying and developing the best people for key organizational roles.[45] Although there are different models of workforce planning, most include similar basic steps and issues for consideration. Following are four phases consistently identified as needed to develop a workforce plan:[46]

1. Review organizational objectives.
2. Analyze present and future workforce needs to identify gaps or surpluses.
3. Develop and implement human resource strategies and a plan.
4. Evaluate, monitor, and adjust the plan.

These phases inform and draw from one another and lack rigid delineations. Workforce planning is a fluid and cyclical process (see Figure 5).

Figure 5: Basic Workforce Planning Model

1. Review organizational objectives.

An important first step in workforce planning is to coordinate strategy. Most organizations have an annual strategic plan, which can be the foundation for workforce

planning strategies.[47] There should be a clear understanding of organizational objectives and the link between workforce planning and other strategic objectives. Leaders will want to consider questions like the following:

- What are our strategic goals and objectives? Does this plan address the future that we have identified?[48]
- Do we have the skills and the people to achieve our objectives over the next two years? The next five years?
- Do our current and future organizational needs take into account workforce demographics, mission, goals, position allocations, and workloads?[49]
- Are the skills and the people truly aligned with the needs of our organization?
- Are alternative workforce strategies available to accomplish the goals and objectives?

Strategic planning at the local level is becoming more common and involves the creation of an overall mission statement, identification of core values, and specification of organizational goals by the organization's stakeholders.[50] Despite the high number of municipalities' engaged in strategic planning only 41.4 percent of them incorporate a human resource section into their strategic plans.[51]

The field of human resource management has seen many changes in the last decade. One of the most pronounced is the shift from a focus on tactical and day-to-day management to strategic management.[52] Although the role of human resource directors is clearly changing, many communities, including several in North Carolina, may not yet consider human resource directors to be strategic players in the planning process. "A strategic perspective suggests that an organization is forward-thinking and conceives of human capital as a valuable asset to the government. Moreover, it suggests that human resource management departments' staff are integral members of the strategic planning community."[53]

2. Analyze present and future workforce needs to identify gaps or surpluses.

The next phase of workforce planning is to analyze current and projected workforce needs and then identify gaps between them. Governments must gain a strong understanding of the composition and characteristics of their present workforce to aid them in determining current conditions and highlighting areas that may require additional planning to meet future needs. The analysis phase can be broken into three steps: (a) analyze the current workforce profile; (b) analyze the future workforce profile; and (c) determine gaps and surpluses.

a. Analyze the current workforce profile.

The first step is to establish a "snapshot," or baseline, of where the organization is now. This process is crucial for the entire organization, various departments, and even

specific organizational functions or classifications to undertake. Leaders might consider the following as they go through this phase:

- Demographic data on the workforce: age, gender, race, tenure, and education levels
- Retirement eligibility statistics and patterns
- Employees' skills, knowledge, and competencies
- Salary data and contract/temporary costs[54]
- Supervisory ratios and management/employee ratios, including projected retirement of people in leadership positions
- The extent to which functional requirements are linked to meeting the objectives identified in phase 1
- The extent to which turnover has reduced the skill set of certain occupational groups

Having data about employees is crucial in conducting workforce planning. It allows human resource managers to allocate human capital in the best possible way. North Carolina municipalities were asked to identify what types of workforce data they collect, from basic data such as demographics, to more sophisticated data such as competencies of the current workforce.[55] A significant number of the responding municipalities collected workforce data, particularly basic workforce data, many elements of which are required for other human resource reporting. For example, 83 percent collected information on basic demographics, and 71 percent, on age distribution (see Table 1).

Table 1: Workforce Data Collection

		No			
	Yes	**Identified As a Need**	**Not Identified As a Need**	**Developing**	**Municipal-ities Responding**
Demographics (e.g., gender, race, ethnicity)	83.3%	6.7%	6.7%	3.3%	30
Age distribution of current workforce	71.4	14.3	7.1	7.1	28
Skills of current workforce	20.7	51.7	20.7	6.9	29
Competencies of current workforce	13.8	44.8	24.1	17.2	29
Average years of service of current workforce	86.7	6.7	3.3	3.3	30
Time to fill vacant positions	65.5	17.2	10.3	6.9	29
Employee performance levels	72.4	17.2	6.9	3.4	29
Turnover rates	90.0	3.3	3.3	3.3	30
Labor market skill availability	33.3	51.9	14.8	0.0	27

Although most responding municipalities collected basic data, less than 25 percent collected data on skills or competencies of the current workforce. Competencies are more complicated measures, but most identified these types of data as still needed, or were developing means to collect them. Given a lack of data in this area, municipalities may have difficulty moving into steps *b* and *c*, identifying future workforce needs and projecting skill gaps, respectively.

b. Analyze the future workforce profile.

Leaders must next identify future workforce needs, composition, changes, and skills in order to outline job requirements. They might consider the following:

- What new skills will we need in order to accomplish our goals and mission?
- How many employees will be needed to meet future service needs?
- What factors affect the demand for our services?
- How might new technologies change how the service is provided?
- Which are critical positions?
- Which critical positions are essential to the achievement of the mission and goals of the agency?
- What skills or positions are needed in emergency situations?
- How is the workforce going to change?
- What external workforce trends, such as skill availability in the labor market, will affect us?
- What are the potential impacts of legislative changes?
- What are the impacts of social and economic trends?
- What will be the competition for future skills?

Survey respondents were asked to what extent they undertake particular planning and analysis activities. Of the 12 possible activities identified in the survey, only 5 were conducted by more than half of the municipalities: retirement projections, analysis of the competitiveness of compensation strategies, analysis of short-term staffing needs, development of recruiting plans, and identification of key positions in the municipality. Not only were these activities less likely to be undertaken than basic data collection, but they also were much less likely to be identified as a need.

c. Determine gaps and surpluses.

The materials gathered in steps a and b provide the data necessary to analyze resulting gaps and surpluses. "Gap analysis" is the process of comparing information discovered through the "current workforce profile and the future workforce profile to identify 'gaps' or surpluses in the current staffing levels and organizational skills, and the staffing levels and skills that are anticipated for the future workforce needs."[56] Gap analysis helps provide the information necessary to develop strategies and solutions for current as well as future needs.

In determining gaps and surpluses, the most important question is: "What is the gap between the projected need and the projected supply?" Additionally it is useful to consider these questions:

- Do we currently have the skills that we anticipate needing?
- Are there areas in which future needs exceed current resources and projections?
- What skill gaps are critical for future goal accomplishment?
- Are there areas in which the current workforce exceeds the projected needs of the future?
- Are there areas in which the current supply will meet the future needs, resulting in a gap of zero?
- Are there existing employee skills, qualifications, or short- and long-term competencies required for the proposed organizational objectives?

Once gaps are identified, management and leadership should prioritize the gaps that will have the most impact on organizational goal attainment.[57]

Only 7.1 percent of respondents undertook workforce gap analysis; 35.7 percent reported that it had not been identified as a need (see Table 2). The latter finding is understandable, given the low percentage of municipalities collecting data on their

Table 2: Planning and Analysis Activities

| | | No | | | |
	Yes	Identified As a Need	Not Identified As a Need	Developing	Municipal- ities Responding
Retirement projections	66.7%	13.3%	10.0%	10.0%	30
Competitiveness of compensation strategies	79.3	17.2	3.4	0.0	29
Inclusion of human resources section in municipality strategic plan	41.4	37.9	17.2	3.4	29
Short-term staffing needs (1 year or less)	53.3	16.7	23.3	6.7	30
Long-term staffing needs (more than 1 year)	39.3	32.1	21.4	7.1	28
Recruiting plans	64.3	17.9	7.1	10.7	28
Identification of high-potential employees	31.0	31.0	27.6	10.3	29
Identification of critical hiring areas	46.4	25.0	14.3	14.3	28
Identification of key positions within municipality	60.7	10.7	14.3	14.3	28
Succession plans	14.8	51.9	22.2	11.1	27
Training plans	46.7	30.0	6.7	16.7	30
Workforce gap analysis	7.1	42.9	35.7	14.3	28

workforce skills and competencies. Analysis of current and future workforce needs requires further emphasis in most municipalities.

3. Develop and implement workforce strategies and A Plan

When the organization clearly understands present and future needs, including the gap between them, it can develop and implement strategies and responses to give it a cohesive strategic workforce plan for effective service delivery. Workforce planning strategies aim to affect the entire life cycle of employees, from selection to training to turnover. Governments will need to determine the components to be included in the workforce plan; these are likely to involve changes in recruitment, development, and retention methods, and outsourcing strategies. Strategies might include addressing the organization's position on specific skill groups, such as information technology professionals or engineers, including what work model the organization would like to employ relative to these groups (retention, new hires, retraining, or outsourcing).

In selecting and implementing strategies, it is important to consider issues such as the following:

- **Time**
  Is there time to develop staff internally for upcoming vacancies and skill shortages, or is specialized recruitment the best option?[58]
- **Resources**
  What resources (staff, money, technology, etc.) are currently available to provide assistance in developing and implementing the selected strategies?
  Does the cost of providing the resources justify the result?
  Are adequate resources available for implementing the selected strategies?
- **Internal Depth**
  Do current staff demonstrate the potential and interest to develop the skills necessary to be promoted to new or modified positions, or will external recruitment be needed?[59]
  How will people be identified for future training and development?[60]
- **Alignment with Goals**
  Are selected strategies aligned with the organization's mission and goals?
  Are there clear objectives for the strategies selected?
  How do different workforce strategies affect outcomes?

Although an organization may not have a formal workforce plan in place, it already may be undertaking some commonly employed strategies through its human resource services.[61]

North Carolina Results for Step Three

The survey revealed that workforce training and employee development activities lack uniformity across municipalities. Although almost all respondents conducted supervisory training and allocated money for external training, 50 percent or less conducted additional strategies, such as leadership development programs and cross-

Table 3: Training & Development Activities

	Yes	No Identified As a Need	No Not Identified As a Need	Developing	Municipalities Responding
Formal cross-training programs	40.0%	36.7%	23.3%	0.0%	30
Formal mentoring	7.1	57.1	32.1	3.6	28
Leadership development programs	50.0	36.7	10.0	3.3	30
Management development programs	46.7	40.0	13.3	0.0	30
Individual development plans	46.7	30.0	16.7	6.7	30
Individual development gap analysis	13.8	37.9	41.4	6.9	29
Rotational work assignments	34.5	17.2	48.3%	0.0	29
Identification of organizational competencies	36.7	33.3	26.7	3.3	30
360-degree evaluations	15.4	23.1	50.0	11.5	26
Provide money for external training (e.g. to cover conference fees, course registration, etc.)	100.0	0.0	0.0	0.0	30
Supervisory training	93.3	3.3	0.0	3.3	30
Formal coaching	41.4	37.9	13.8	6.9	29

training. Activities such as mentoring were performed by less than 10 percent of respondents. (See Table 3.)

Given that few municipalities conduct workforce and succession planning, it is not surprising that few conduct advanced training and development activities. Still, the high percentage that do not identify such activities as needed is concerning. Additional training and education for municipalities may be an important next step.

4. Evaluate, monitor and adjust plan

Just as strategic plans undergo an annual review, workforce plans need regular evaluation and adjustment. By reviewing the workforce plan, an organization has the opportunity to assess what is working and what is not, and make necessary adjustments. Doing so will ensure that the plan and related strategies are in line with the agency's mission, goals, initiatives, strategic plan, and vision, and that they address new workforce and organizational issues and developments.[62]

Some important dimensions to consider in this area are:

- What goals or objectives have we met?
- Have our strategies achieved the intended results?
- Have our projections been on target?

- Are we getting the necessary feedback from program managers and supervisors?
- What is the budgeting impact of the planning process, and what resources are available?
- Have there been indicators of change and a need to realign workforce planning efforts?

Few municipalities undertake a formal central workforce planning process, so respondents were not asked about evaluation of their programs. Instead, they were asked what barriers they faced in considering workforce planning.

Results from the International Public Management Association for Human (IPMA-HR) national survey provide a starting point for a better understanding of common barriers. In that survey the most common barriers to creating timely and complete workforce plans included preoccupation with short-term activities, insufficient staffing, lack of funding, and lack of executive support (see Table 4).

Survey respondents identified several other barriers, including agency uncertainty, given no mandate for workforce planning. Changes in administration and fiscal constraints on supporting new initiatives were also seen as barriers.[63] Additionally, "many jurisdictions feel pulled in two directions: their workforce-planning process shows them there are serious challenges ahead due to an aging workforce and retirements, but their budgets are severely cut. There's pressure to choose a short-term fix, such as early retirements, layoffs, and reduced training."[64]

Anecdotal evidence indicates that North Carolina municipalities face barriers similar to those faced by their counterparts in other states. Reporting on barriers to succession planning, Ritchie found that lack of personnel to manage the program and lack of time to participate were most commonly identified.[65] Organizational culture,

Table 4: Barriers to Planning for IPMA–HR Participants

Barriers	Percentage*
Preoccupation with short-term activities	39.2
Insufficient staffing	34.0
Lack of funding	25.8
Lack of executive support	18.0
Restrictive merit system rules on hiring	13.4
Insufficient marketing effort	6.2
Lack of confidence in planning technique	6.2
Resistance to change	1.0

Source: From Gilbert L. Johnson & Judith Brown, *Workforce Planning Not a Common Practice, IPMA–HR Study Finds*, 33 Public Personnel Management 379, 386 (2004), text available as a PDF at http://unpan1.un.org/intradoc/groups/public/documents/IPMA-HR/UNPAN017926.pdf. Reprinted by permission.

low priority given by senior management, and insufficient financial resources also were identified. Barriers to workforce planning are likely to be similar to those for succession planning.

Table 5:   North Carolina Barriers to Succession Planning

Rank		
1	Insufficient human resources to manage program	60.0%
2	Insufficient time to participate	46.7%
3	Organizational culture	43.3%
4	Low priority given by senior management	40.0%
5	Insufficient financial resources	40.0%
6	Low priority given by elected officials	26.7%
7	Lack of mobility of employees	23.3%
8	Lack of role models	10.0%
9	Inadequate rewards for initiative/risk	6.7%

Note: The sample size is 30. Also, percentages may not add up to 100 because of rounding.

The barriers identified for North Carolina municipalities might indicate that municipalities do not view their human resource departments as crucial strategic players. Specifically the 40 percent indicating lack of priority given by senior management is a concern, for executive support has been found to be a crucial component of successful planning. If human resources generally do not receive management support, human resource–led initiatives will find it difficult to succeed.

Recommendations and Conclusion

The message that workforce changes are coming is not new. Neither are concerns about government's readiness to address them successfully. In the early twentieth century, Henri Fayol, a management scholar, wrote about the fourteen points of management, among them, that management has a responsibility to ensure the "stability of tenure of personnel."[66] If that need was ignored, Fayol believed, key positions would be filled by ill-prepared people.

Given the lack of governments that include HR in their strategic planning process or have a formal, or even informal, workforce plan it appears that support for this process as well as the recognition of HR as a business partner is low amongst many municipalities. As noted earlier, it is important when undertaking workforce planning that top management set overall direction and goals. Obtaining managerial and supervisory input and commitment is important in development and implementation of workforce planning strategies. Also essential is establishment of a communication strategy to create shared expectations, promote transparency, and report progress. During workforce planning, communicating with and involving managers is necessary, for they will be crucial in many steps of the process, including data acquisition and

analysis, selection of strategies for change, implementation of strategies, and evaluation of the plan's impacts.[67,68] Communication and support were lacking for many of the municipalities included in this sample, with the organizational culture and low priority given by senior managers being the third and fourth most common barriers to planning.

Despite the obstacles to and the complexity of good planning, governments should begin to consider how they might use workforce planning. Although few local governments have formal workforce plans, the research reported in this article found that, as part of their human resource activity, many are undertaking practices or strategies that are components of workforce planning and provide a starting point. For example, many are collecting basic data on their workforce, this is a wise and manageable first step since understanding the current workforce better can help to begin a dialogue on this issue within the organization. Another helpful step is to consider the connection between workforce planning and the organization's larger strategic planning initiatives as leaders think about what they will need from the workforce in the coming years.

Like all major changes and initiatives, workforce planning requires long-term and significant commitment throughout an organization. It is not easy and will not occur overnight. The plan should have a 5- to 10-year time horizon and commitment from those who lead the organization and those who implement the plan. There are many aspects and dimensions to consider in undertaking this process, including time, resources, internal depth, "in-demand" competencies, workplace and workforce dynamics, and job classifications. Formulating all aspects of a good plan might take several years and involve long-term culture change by the organization.[69] As noted in common barriers include lack of time, resources, and culture all which inhibit this process.

Although few local governments have formal workforce plans, the research reported in this article found that, as part of their human resource activity, many are undertaking practices or strategies that are components of workforce planning and provide a starting point. Workforce planning must start somewhere—possibly with conversations between leaders and department heads or with gathering of relevant data and indicators. The main message is to start somewhere and keep it simple. If the organization wants line managers to do regular workforce planning, it must make such planning uncomplicated for them and integrate it into other processes, such as strategic planning or budgeting.[70]

This research contributes to the current understanding of what workforce planning practices are being used by local governments in North Carolina, additional actions and practices are being recommended. Future research would benefit from also looking at county government to provide a more comprehensive picture of local government. Additionally, a broader national sample would offer additional insights. As organizations use workforce planning, and Human Resource Planning, evaluation is needed of the planning process as well as the specific practices being employed. Research has demonstrated a link between high performing governments and workforce planning efforts, more research in this area is needed.[71] Further

investigation into the utility and effectiveness of alternative practices will benefit employees and employers alike.

"Forewarned is forearmed. And forearmed is *confident*. One of the most striking benefits of thorough, ongoing workforce planning is the level of calm it provides—even in jurisdictions facing significant numbers of retirements."[72]

Notes

1   Rivenbark, William C. (2004). Defining performance budgeting for local government. *Popular Government,. 69*(2).

2   Drennan, Heather. (2005). Effectiveness of strategic planning in North Carolina municipal government.   MPA Capstone Paper. UNC-CH.

3   Rivenbark, (2004), op. cit.

4   Rivenbark, (2004), op. cit.

5   Pynes, Joan E. (2004)."The Implementation of Workforce and Succession Planning in the Public Sector". *Public Personnel Management*. *Vol. 33*, No. 4

6   Government Performance Project Survey, (2001). See Selden, Sally, & Jacobson, Willow (2007). Chapter four: Government's largest investment—human resource management in states, cities, and counties. *In Pursuit of Performance: Management Systems in State and Local Government.* (Patricia Ingraham, Ed.). John Hopkins Press.

7   http://www.work911.com/planningmaster/Human_Resource_Planning/

8   Selden, Sally and Willow Jacobson (2007).*Government's Largest Investment—Human Resource Management in States, Cities, and Counties, in In Pursuit of Performance: Management Systems in State and Local Government* (Patricia Ingraham ed.) Baltimore: John Hopkins Press.

9   Kiyonaga, Nancy. (2004). Today is the Tomorrow You Worried About Yesterday: Meeting the Challenges of a Changing Workforce. *Public Personnel Management. Vo. 33* No. 4

10 Idaho Division of Human Resources. *Workforce Planning Guide*. Retrieved July 2, 2006, from http://www.dhr.idaho.gov/hrinfo/workforceplanningguide.pdf. (last visited Oct. 31, 2006).

11 Mary B. Young, The Aging-and-Retiring Government Workforce: How Serious Is the Challenge? What Are Jurisdictions Doing about It? Report sponsored by CPS Human Resource Serv. (Burlington, Mass.: Ctr. for Org. Research/A Div. of Linkage, Inc., 2003), available at www.cps.ca.gov/AboutUs/documents/CPS_AgeBubble_FullReport.pdf (last visited Oct. 31, 2006).

12 Dychtwald, K., Erickson, T., & Morison, B. (2004). It's time to retire retirement. *Harvard Business Review*, March, 48-57. Also, leadership talent often is in short supply. In a study by McKinsey, 75 percent of respondents said that their organizations were continually short of leadership talent. As cited in William C. Byham, *Grooming Next Millennium Leaders: Start Now to Identify and Develop the Next Generation of Leaders*, HR MAGAZINE, Feb. 1999, at 48.

13 U.S. General Accounting Office, , GAO-01-509, Federal Employee Retirements: Expected Increase Over the Next 5 Years Illustrates Need for Workforce Planning (Washington, D.C.: USGAO, 2001; Jay Liebowitz, Bridging the Knowledge and Skills Gap: Tapping Federal Retirees, *Public Management* Jan./Feb. 2004, at 18; Young, *The Aging-and-Retiring Government Work Force*.

14 Id.

15 "The Age Bubble is the balloon effect created by the baby boom generation (people born between 1946 and 1964) whenever it does anything en masse—whether it's starting school (which led to overcrowded classrooms and double-sessions, followed by a building boom in new schools), becoming teenagers, going to college (another spate of professor-hirings and

expanded campuses), becoming parents, turning 50 (the AARP reinvented itself to become more attractive to 'young elders'), or retiring (the focus of this report). The sheer number of baby boomers who will become eligible for retirement between now and 2015, coupled with the much smaller pool of younger workers who can take their place, make[s] the Age Bubble a critical human resource challenge for employers." Young, The Aging-and-Retiring Government WORK FORCE, at 32. "According to the Bureau of Labor Statistics (BLS), workers age 25–44 will decline by 3 million, dropping from 51 percent of the labor force in 1998 to 44 percent in 2008, while, over the same period, workers age 45+ will increase from 33 percent to 40 percent of the workforce, an additional 17 million workers." Dohm as cited in Young, The Aging-and-Retiring Government Workforce, at 32.

[16] Young, The Aging-and-Retiring Government Workforce.

[17] Craig W. Abbey & Donald J. Boyd, (2002). *The Aging Government Workforce* (Albany, N.Y.: Nelson A. Rockefeller Inst. of Gov't, 2002), available at http://rfs.rockinst.org/exhibit/9006/Full%20Text/AgingGovernmentWorkforce.pdf (last visited Oct. 31, 2006).

[18] *Id*. at 5. "Only about 1 in 5 federal government workers is below 35 years of age. The gap between older and younger federal government workers is 28.4 percentage points. While slightly less pronounced, a similar pattern holds for local government workers[,] with a difference of 19.5 percentage points… The state government workforce has a more even distribution of workers than the other two levels of government. Only 13.1 percentage points separate older state government workers (43.6 percent) from younger state government workers (31.5 percent)." *Id*.

[19] There has been increased attention to the issue of preparing the next generation of local government managers. The International City/County Management Association has begun to tackle this issue actively. For example, see Frank Benest, *Preparing the Next Generation: A Guide for Current and Future Local Government Managers* (Washington, D.C.: Int'l City/County Mgmt. Ass'n, 2003), available at jobs.icma.org/documents/next_generation.cfm?cfid=283007&cftoken=25103158 (last visited Oct. 31, 2006).

[20] Abbey, (2002), op. cit..

[21] Young, (2003), op. cit.

[22] Jay M. Shafritz et al., *Personnel Management in Government: Politics and Process* 304–06 (5th ed. New York: Marcel Dekker, 2001).

[23] Young, (2003), op. cit.

[24] Tompkins, Jonathan. (2002). Strategic Human Resource Management in Government: Unresolved Issues. *Public Personnel Management*. Vol. 31 No.1

[25] Ibid

[26] Pynes, Joan. (2004). The implementation of workforce and succession planning in the public sector. *Public Personnel Management, 33*(4), page 389

[27] Joan Pynes, *The Implementation of Workforce and Succession Planning in the Public Sector*, 33 *Public Personnel Management* 289 (2004); U.S. Office of Pers. Mgmt., Succession Planning Process (Washington, D.C.: USOPM, 2005), available at www.opm.gov/hcaaf_resource_center/assets/Lead_tool1.pdf (last visited Nov. 22, 2006).

[28] U.S. Office of Pers. Mgmt., *Succession Planning Process*.

[29] U.S. Gov't Accountability Office, GAO-05-207, *High-Risk Series: An Update* (Washington, D.C.: GAO, Jan. 2003), available at www.gao.gov/new.items/d05207.pdf (last visited Oct. 31, 2006). In a 2002 Federal Human Capital Survey, more than 1 out of every 3 federal employees said that they were considering leaving their jobs. Research by the Partnership for Public Service found that by 2004, 53 percent of federal civil servants and 71 percent of federal senior executives had achieved retirement eligibility. Further, about half of the federal government's information

technology workforce will be eligible for retirement in the year 2010. As cited in Liebowitz, *Bridging the Knowledge and Skills Gap*.

[30] Scores for human capital on the President's Management Agenda: Scorecard demonstrate this variation. See www.whitehouse.gov/results/agenda/scorecard.html (follow "The Scorecard—September 30, 2006" hyperlink) (last visited Nov. 22, 2006).

[31] The President's Management Agenda, The Five Initiatives, Winning the Game with Succession Planning, available at www.whitehouse.gov/results/agenda/humancapital11-03.html (last visited Nov. 22, 2006).

[32] Selden & Jacobson, *Government's Largest Investment*; Government Performance Project (GPP), at http://results.gpponline.org (last visited Nov. 7, 2006).

[33] This conclusion is supported by data and findings from the Government Performance Project and the International Public Management Association for Human Resources. Selden & Jacobson, *Government's Largest Investment*; Gilbert L. Johnson & Judith Brown, *Workforce Planning Not a Common Practice*, *IPMA–HR Study Finds*, 33 PUBLIC PERSONNEL MANAGEMENT 379, text available as a PDF at http://unpan1.un.org/intradoc/groups/public/documents/IPMA-HR/UNPAN017926.pdf (last visited Oct. 31, 2006).

[34] Selden & Jacobson, *Government's Largest Investment*. The data were based on a sample of the nation's 35 largest cities and 40 large counties.

[35] These may well be inflated percentages. Probably a much lower percentage of participants actually had a workforce plan. Johnson & Brown, *Workforce Planning Not a Common Practice*. In 2004, IPMA–HR issued a survey to its 5,700 members designed to measure the extent to which public agencies use workforce plans and have a formalized workforce-planning process in place. The response rate to the workforce planning section of the survey was low (only 97 responses were received). The authors of the survey report conducted a follow-up telephone survey using a random sample of nonrespondents. It found that these people did not have workforce plans and thus did not return the survey. Thirty-nine percent of the 2004 IPMA–HR survey respondents indicated that they were actively involved in succession planning, and 51 percent identified themselves as city, town, or village governments. *Id*.

[36] For example, a 1996 survey conducted by the National Academy of Public Administration's Center for Human Resources Management revealed that only 28 percent of government respondents had, or planned to have, a succession management program. Nat'l Academy of Public Admin., Ctr. for Human Resources Mgmt., *Managing Succession and Developing Leadership: Growing the Next Generation of Public Service Leaders* (Washington, D.C.: the Academy, 1997).

[37] Drennan, (2005), op. cit.

[38] Christina E. Ritchie, a graduate student at UNC at Chapel Hill, conducted the survey as part of her unpublished MPA capstone paper, Who Will Lead Tomorrow's Workforce? The Status of Succession Planning in North Carolina Municipalities (2005) (on file with author). Special thanks to her for all her contributions to this research effort.

[39] The initial survey instrument was pre-tested with two North Carolina county human resources departments. Based on feedback received, minor revisions were made. The final survey was distributed as an email attachment to the human resources director of each municipality. In cases where the municipality did not have a human resources director the survey was sent to the city/town manager. The survey consisted of fifteen open and close-ended questions. Several questions were adapted from a 2001 Maxwell School of Citizenship and Public Affairs "Government Performance Project" survey; others were developed from the review of the succession planning literature.

[40] Questions were asked on the formality of the workforce process, data collection, analysis efforts, HR practices, barriers and challenges.

[41] The final survey was distributed as an email attachment to the human resources director of each municipality. In cases where the municipality did not have a human resources director the survey was sent to the city/town manager.

[42] There was not a statistically significant difference between the populations of those municipalities who did or did not respond to the survey, making concern of response bias minimal.

[43] They are consistent with the 2004 IPMA–HR survey results as well as with the GPP results. Johnson & Brown, *Workforce Planning Not a Common Practice;* Selden & Jacobson, *Government's Largest Investment*.

[44] Selden & Jacobson, *Government's Largest Investment*.

[45] Patrick Ibarra, The Mejorando Group Presentation, City of Wilmington Regional Workshop (June 15, 2005).

[46] The U.S. Office of Personnel Management suggests the following five steps as part of its Workforce Planning Model: Step 1: Set strategic direction; Step 2: Analyze workforce, identify skill gaps, and conduct workforce analysis; Step 3: Develop action plan; Step 4: Implement action plan; and Step 5: Monitor, evaluate, and revise. OPM'S WORKFORCE PLANNING MODEL (Washington, D.C.: OPM, Sept. 2005), available at www.opm.gov/hcaaf_resource_center/assets/Sa_tool4.pdf (last visited Nov. 22, 2006).

[47] Idaho Div. of Human Resources, Workforce Planning Guide.

[48] *Id*.

[49] *Id*.

[50] Rivenbark, *Defining Performance Budgeting*.

[51] Ritchie, Who Will Lead Tomorrow's Workforce?

[52] Selden & Jacobson, *Government's Largest Investment*.

[53] *Id*.

[54] *Id*.

[55] Data were collected on demographics (gender, race, ethnicity, etc.); age distribution, skills, competencies, and average years of service of current workforce; time to fill vacant positions; employee performance levels; turnover rates; labor market skill availability; retirement projections; competitiveness of compensation strategies; inclusion of a human resource section in the municipal strategic plan; short-term staffing needs (one year or less); long-term staffing needs (more than one year); recruiting plans; identification of high-potential employees; identification of critical hiring areas; identification of key positions in the municipality; succession plans; training plans; and workforce gap analysis.

[56] *Id*. at 6.

[57] Pennsylvania, (2006), op. cit

[58] Idaho, (2006), op. cit.

[59] *Id*.

[60] Pennsylvania, (2006), op. cit

[61] Idaho, (2006), op. cit.

[62] Pennsylvania, (2006), op. cit

[63] Johnson & Brown, *Workforce Planning Not a Common Practice*.

[64] Young, The Aging-and-Retiring Government Workforce, at 6–7.

[65] Ritchie (2005), op. cit.

[66] Henri Fayol, General and Industrial Management 62 (Irwin Gray rev., New York: Inst. of Electrical and Electronics Engineers, 1984).

[67] This point is drawn from the GAO report, which identified numerous lessons and strategies that can help agencies successfully implement strategic workforce plans based on the human capital experiences of leading organizations. As cited in Johnson & Brown, *Workforce Planning Not a Common Practice*.

[68] Additionally, communicating succession needs and opportunities to staff is crucial. However, staff should recognize that succession plans are not guarantees of long-term employment or advancement.

[69] Dave Fountaine, *Human Resources: What's Your Plan?* PUBLIC MANAGEMENT, Jan./Feb. 2005, at 25.

[70] YOUNG, THE AGING-AND-RETIRING GOVERNMENT WORKFORCE.

[71] Selden, Sally and Willow Jacobson (2007). Government's Largest Investment—Human Resource Management in States, Cities, and Counties, in *In Pursuit of Performance: Management Systems in State and Local Government* (Patricia Ingraham ed.), Baltimore: John Hopkins Press.

[72] Young, The Aging-and-Retiring Government Workforce. 6–7.

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