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Combating the Silver Tsunami: How Can Santa Clara County Local Agencies Develop the Next Generation of Leaders?

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**Combating the Silver Tsunami: How Can Santa Clara County Local Agencies Develop the
Next Generation of Leaders?**

by
Nadia Webster

A Thesis Quality Research Project
Submitted in Partial Fulfillment of the
Requirements for the
Master's Degree
in

PUBLIC ADMINISTRATION

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Background

In the current business climate, attracting, retaining, and developing public servants is a top priority for public agency human resource managers (Naim & Lenkla, 2016). Local governments are unable to adequately address social issues such as climate change, transportation, affordable housing, and accessible health care without attracting and retaining talented staff (Benest, 2009). In 2016, the United States government was hit with what is referred to as the Silver Tsunami, a wave of retirements that occurred as public workers who were born between 1946 – 1965 (also referenced to as the “baby boomers”) exited the workforce (Bruner, 2018, p.18). The coined term arose from the 10,000 baby boomers who have attained retirement age every day since 2011. This wave of retirements is an issue because the following generation, Generation X (people born between 1961 – 1980), is significantly smaller, leaving a higher demand for public servants than can be supplied. Furthermore, Generation X will be retiring a few years after the baby boomers. Since many of the retirements will be from long-term careers in senior executive roles, most of the talent gap will be in managerial and skilled classification roles. It is projected that by 2030, public agencies will be comprised of 75% Generation Y or “millennials” (people born between 1981 – 2000) (Naim & Lenkla, 2016).

According to Benest (2009), the talent gap is more significant in the public sector than in the private sector. This is due to baby boomers beginning their careers during the John F. Kennedy era, when individuals were inspired to join public service in hopes of positively impacting society. The problem arises because not only is there a disproportionately small number of Generation X replenishing the baby boomers, but millennials are largely beginning their careers in the private sector. Millennials are typically not wanting to begin their careers in government (Bruner, 2018). Findings from a study conducted by the Center for State and Local

Government Excellence and the National Institute on Retirement Security revealed that state and local government employees “earned 11 to 12 percent less than comparable private-sector workers when factors such as education and experience were accounted for” (Bruner, 2018, p. 20). As such, the large number of baby boomers retiring in comparison to the number of millennials replacing them creates a talent crisis. “Turnover without planning can lead to increased costs, lack of continuity, and immediate negative effects on organizations” (Jacobsen, 2010, p. 356). As a result, it is imperative for public agencies to strategically develop a plan to attract, retain, and develop future leaders.

Much of what is said about millennials in the work force is negative (Bruner, 2018). Research on millennials suggests that they are “self-centered, unmotivated, disrespectful, self-confident, and disloyal” (Meng, Bryan, & Rogers, 2017, p. 70). Baby boomers find it difficult to work with this new age group of workers, especially when it comes to the transition from paper sources to technology and new expectations of work culture (Bruner, 2018). Millennials entered the workforce as unemployment rates were on the rise shortly after the Great Recession (December 2007 – June 2009). This made it difficult for millennials to acquire opportunities for leadership development that the older generations had received as the older generations had been in the workforce decades longer. Millennials need to have opportunities for leadership development and growth in the same way baby boomers and Generation X workers had provided to them when they began their careers in the public sector (Bruner, 2018).

Succession management is a collaborative effort for agencies to attract, develop, and retain new leaders; it is “a plan an organization develops to meet its most critical employment needs to sustain a talented workforce given the impending changes in the workforce” (Azevedo, 2013, p. 10). A 2018 survey by the Santa Clara County Leadership Academy revealed that 12 of

the 18 public agencies in Santa Clara County local governments are not implementing succession plans. The public agencies with no succession plan include: City of Cupertino, City of Gilroy, Town of Los Altos Hills, Town of Los Gatos, City of Milpitas, City of Palo Alto, City of San José, City of Santa Clara, County of Santa Clara, County of Santa Clara, City of Saratoga, and City of Sunnyvale (Rich, 2018).

Problem Statement

Although retirements are expected as part of a lifecycle within organizations, the Silver Tsunami potentially removes a large amount of valuable expertise and intellectual capital from public agencies. The implications of this wave of retirements not only include an inadequate number of senior executives in public service, but also the loss of institutional knowledge that has been acquired within agencies over time. This research will explore the implications of the wave of retirements of baby boomers from senior executive roles within the public sector, and analyze what Santa Clara County local government agencies are doing to prepare and develop the next generation of leaders. The study will answer the following question: How can Santa Clara County local government agencies develop the next generation of leaders as baby boomers exit the workforce?

Leadership Development Resources

In 2010, a leadership academy was formed by ten local governments in Santa Clara County. The Santa Clara County Leadership Academy (SCCLA) was created with the intention of developing emerging leaders. According to SCCLA (2019), “The goals of the Leadership Academy include: to create a cost-effective talent development program for the participating jurisdictions; to enhance the leadership skills of the participants; to assist the participating local governments in their succession planning efforts; to enhance the network of participants across

local government agencies in the County; and to offer employees positive development opportunities and motivating experiences in tough times” (para. 2). One-day class sessions are held monthly over an eight-month time span. Classes consist of in-class presentations from current and former city managers as well as other local government leaders. Participants also critique case studies and engage in team projects.

Topics from the SCCLA 2019 program included: The Essentials of Leadership and Ethics; Communicating for Success; Employee Engagement; The Freedom to Think, The Courage to Act; Finance Skills for Non-Finance People; Talent Development and Coaching; Political Astuteness/Graduation; and Post Graduation Session - Applying Your Learning/Securing Leadership Opportunities (SCCLA, 20019). Participants come from public agencies and are individuals interested in becoming leaders for the public sector. Additionally, participants are typically “mid-level managers or supervisors such as Deputy Directors, Division Managers, Section Supervisors, Senior Analysts, or someone who has been identified by their organization as an emerging leader” (SCCLA, 2019, para. 5). Although there are leadership development programs in place, not every Santa Clara County local agency participates.

While the leadership academy approach offers classroom instruction in skills and tools, there is also a different approach based on practice. This research focuses on the Management Talent Exchange Program (MTEP). This leadership development program was created by the International City/County Management Association (ICMA), which was founded in 1914. Its mission is to help “local government professionals around the world create and sustain thriving communities through a range of activities” (ICMA, 2019b, para. 1). In 2004, MTEP was launched by the City Manager’s Associations of Santa Clara and San Mateo Counties (ICMA, 2019a). MTEP offers future leaders from small and medium sized municipalities a unique

opportunity to work in another local government for three months. This experience provides participants with the ability to develop skills and network. It is intended to develop the next generation of executive leaders during the talent crisis caused by the Silver Tsunami (MTEP, 2019). The program is run through the City of Palo Alto's Human Resources Department. Municipalities nominate participants who are considered high-potential and then match them for another agency's stretch assignment after the participant undergoes an interview hosted by manager and human resource professionals (ICMA, 2019a, para. 2). Participating agencies that send an employee to another agency typically receive an MTEP participant from another agency in exchange. Supervisors at the hosting agency act as the participant's mentor. Additionally, participants attend three forums for progress checks and to discuss feedback and challenges faced while on their assignment.

MTEP was initially funded by Cooperative Personnel Services (CPS) Human Resource Services, an HR consulting firm. After the program proved to be successful, the City Manager's Associations of Santa Clara and San Mateo Counties decided to fund the majority of the program and have the remaining costs covered through corporate funding (ICMA, 2019a). According to ICMA (2019a), "annual funding of \$30,800 [comes] from three sources: the two city managers' associations each provide \$2,000 for a total of \$4,000; each of the 26 agencies pays \$800 per participant, for a total of \$20,800; and Bill Avery & Associates, [an executive search and labor relations consulting firm,] provides \$10,000 in corporate funding" (para. 7). MTEP benefits municipalities by developing the next generation of leaders as baby boomers exit the workforce. It also allows for hosting agencies to use MTEP participants to complete projects which agencies otherwise would not have the resources for.

Literature Review

According to Bruner (2018), public agencies have the “oldest average workforce of any major industry” nationwide (p. 18). Because of this rapidly aging workforce, municipalities nationwide are experiencing a brain drain, which leaves the organization in dire need of seasoned and experienced workers (Ibarra, 2016). Public agencies must understand that succession management goes beyond retirement packages and hiring replacements. With baby boomers retiring, public agencies are struggling to attract the right talent among millennials as well. Without attracting, developing, and retaining the next generation of leaders, “state and local organizations will not be equipped to adapt to the impending brain drain, nor will they be able to manage the tasks that need to be done in order to” adequately serve the public (Cornerstone, 2014, p. 1).

Research on succession management indicates that “local governments have not adequately prepared for the baby boomer retirement wave and are struggling to fill the void” (Cal-ICMA, 2018, p. i). Conversely, studies show that there is hope in attracting millennials to seek leadership roles in public service. According to Cal-ICMA (2018), like the baby boomers, millennials seek meaningful work; however, unlike baby boomers, millennials are not work-centric, but value work-life balance. Working in the public sector provides individuals with a greater sense of purpose by serving the community. The challenge is to attract, develop, and retain leaders in public agencies. Unfortunately, the leadership pipeline is insufficient due to local governments transitioning to flatter organizations over the last several decades (Cal-ICMA, 2018). Additionally, despite some years passing since the Great Recession, government employers remain as the only sector that has not been able to recover with regard to payroll and

benefits (Bruner, 2018). Thus, budget cuts have made training either difficult to obtain or nonexistent in some municipalities (CAL-ICMA, 2018).

Public agencies of any size can create and implement leadership development programs while being cost effective and without requiring employees to take excessive time off from work (Turner, 2007). A review of literature on developing public leaders reveals that succession management and leadership development are not primarily a human resource function, but rather a senior leadership function (Turner, 2007; Ibarra, 2016). Human resources should support leadership programs, but their success relies upon top agency leaders investing time (Turner, 2007). Advocacy and visible support from executive leadership leads to successful succession planning (Ibarra, 2016).

Ibarra (2016) explains what a successful planning program looks like:

A well-designed succession-planning program will enable an organization to align workforce requirements directly to strategic and operational plans; identify and implement strategies to transition from the existing workforce to the one that will be needed; and build the capability to continually shape the workforce to respond to emerging trends, shifting priorities and technological change (para. 5).

Furthermore, local governments should not rely on obtaining leaders from other agencies, but should grow their own talent. Studies show that “employees who are learning and growing are more likely to stay with an organization” (Cal-ICMA, 2018, p. i). Therefore, public agencies should focus on identifying which roles are more likely to become a “resource pressure point”, and also seek to attract, develop, and retain a “strong talent pool of future leaders” (AON Hewitt, 2012, p. 2). Effective succession management creates employee competency, which results in maintaining an organization’s success in an ever-changing environment.

Knowledge Management

According to Mohammadpour, Kamalian, and Salarzahi (2017), “as one of the most important organizational components, knowledge management requires establishing a system for learning, gathering, maintaining, and distributing knowledge inside the organization” (p. 491). It requires “*organizational forgetting*”, or the concept in which organizations create an effective way to prevent the loss of valuable institutional knowledge while also purposely unlearning certain obsolete organizational knowledge (Mariano, Casey, & Olivera, 2018, p. 170). It is associated with the growth and changes an organization experiences with time through both internal and external factors. Some theories suggest that organizational forgetting is imperative for an organization’s success to make room for new knowledge, as environments change and technology advances. Furthermore, knowledge management allows organizations to maintain competitive advantage (Mohammadpour, Kamalian, & Salarzahi, 2017).

There are two forms of organizational forgetting: accidental forgetting and intentional forgetting (Mariano, Casey, & Olivera, 2018). Theories suggest that organizational forgetting can be managed; however, environmental turbulence, such as the Silver Tsunami, may lead to accidental forgetting (Huang, Chen, Zhang, & Ye, 201). According to Mariano, Casey and Olivera (2018), accidental organizational forgetting decreases if leadership develops relationships with subordinate employees. Furthermore, the effectiveness of an organization’s leaders directly affects which information is kept and which knowledge is unlearned to make room for innovation and organizational growth (Mohammadpour, Kamalian, & Salarzahi, 2017).

It has been suggested that all employees, but especially managerial employees, document their knowledge prior to retirement in order to pass down information to new hires (Mariano, Casey, & Olivera, 2018). Research shows that knowledge transfer and retention is achieved

either through people-to-people knowledge transfer, or by system-based knowledge transfer. The former involves communication through internships, mentoring, story-sharing, job shadowing, and similar techniques, whereas the latter involves document management, shared drives, intranet, social network, and similar resources. When knowledge is withheld from new employees, that information becomes tacit and may be forever lost from the organization (Agarwal & Islam, 2014).

Generations at Work

Research on generational differences in the workplace suggests that better understanding of this dynamic may result in “better recruitment, retention, succession management, communication, employee engagement and conflict resolution” (Jones, Murray, & Tapp, 2018, p. 88). Conversely, research shows that failure to understand the differences may result in “negative organizational outcomes, such as intergenerational workplace conflict, ineffective communication, negative attitudes towards colleagues, decrease in productivity, decrease in morale, and a decrease in citizenship behavior” (Jones, Murray, & Tapp, 2018, p. 88).

Generational difference affects a variety of aspects in the workplace culture, including work-life balance, motivation, values, training style, and leadership preferences and behaviors. Studies show that baby boomers see Generation Xers as “whiners;” Generation X view millennials as seemingly “entitled;” and millennials see baby boomers as “self-absorbed workaholics” (Gelston, 2008, para. 3). Furthermore, the older generations view millennials as lacking a work ethic. Organizations must understand the weaknesses and strengths of each generation in order for there to be a fluid working relationship among them.

Studies show that generational differences stem from various events that an individual may experience in his or her lifetime, such as war, the Civil Rights movement, or an economic

recession (Jones, Murray, & Tapp, 2018). As previously stated, baby boomers make up a large percentage of the workforce. This generation grew up during an era filled with social change, however, this generation was raised in an economically advantageous time, and therefore view their career as an extension of themselves. Baby boomers are hard workers and are motivated by recognition and growth. Additionally, baby boomers value teamwork and have an appreciation for a democratic process in the workplace.

Generation Xers grew up in an era when divorce rates soared and there were more working mothers. This phenomenon resulted in this generation becoming what is known as the latchkey children; those who stayed home without adult supervision. Generation Xers are typically more individualistic and self-reliant. This generation was the first to be introduced to cellular devices and technology. Furthermore, Generation Xers were fueled with uncertainty as they grew up during a time of economic decline and a stagnant job market. This generation is the first to believe that lifelong employment in a company does not exist. According to studies, this is demonstrated in the first spike of organizational disloyalty. Furthermore, this generation is more focused on their career growth than on the success of the organization (Jones, Murray, & Tapp, 2018).

Millennials are the first generation to enter the workforce in large numbers since baby boomers. This is the generation where the term “soccer mom” was coined (Jones, Murray, & Tapp, 2018). Children of this era were considered important by their parents. Research suggests that this resulted in millennials having core values that align with civic duty, confidence, and optimism. Millennials are considered to be the most racially diverse group to enter the workforce. The most significant trait about this generation is their growth in technological advancement. This has affected the way millennials communicate. While past generations

communicated face-to-face, millennials prefer to communicate through technology. Research suggests that millennials are exceptionally hard workers and value intrinsic motivation, including mentorship and training (Jones, Murray, & Tapp, 2018, p. 93). Millennials also greatly value work-life balance (Jones, Murray, & Tapp, 2018, p. 93; Kellar, Franzel, Snowden, & Becker, 2015, p. 15).

Despite their good qualities, there is negative stigma surrounding millennials. Research shows that millennials have “higher levels of self-esteem, assertiveness, and narcissism than previous generations at the same age” (Meng, Bryan, & Rogers, 2017, p. 69). Millennials are also “more accepting of diversity, team-oriented, capable with advanced technology, and adept multi-taskers” (Meng, Bryan, & Rogers, 2017, p. 70). Millennials place great emphasis on finding value in their work and making the workplace fun. Research shows that millennials tend to stay in their job for approximately 18 months; however, if the job is ever-changing and diverse, millennials are more likely to stay in a position for the long-term (Meng, Bryan, & Rogers, 2017, p. 71).

Attracting and Retaining Millennials to the Public Sector

The issue of attracting millennials is both a public relations issue as well as an issue within the lengthy, bureaucratic nature of the hiring process. Research shows that even when people aspire to work for a public agency, often times the hiring process takes so long that the potential employees have already accepted a job offer from a private sector company by the time that they receive an offer from the government (Cornerstone, 2014). Additionally, many local governments do not offer job opportunities for people with minimum qualifications, which minimizes the pool of applicants (Cal-ICMA, 2018). Attracting millennials to public agencies

not only requires that there be a way to demonstrate that their work would be meaningful, but also means restructuring the hiring process to be quicker (Cornerstone, 2014).

As previously stated, the communication style of millennials is fundamentally different than that of earlier generations. This generation is known for their relationship with technology; thus, they are able to offer organizations unique skills in communication and information technology. Conversely, this is also why millennials do not like to wait so long to get a job offer; their reliance on technology has created an expectation that things should happen quickly. Millennials are typically attracted to organizations that offer challenging assignments while allowing flexibility in a work-life balance and “regular positive feedback” (Meng, Bryan, & Rogers, 2017, p.70). Due to a “difficult job market,” millennials typically spend their early twenties obtaining advanced degrees, spending time traveling, volunteering, or interning. These experiences provide millennials with a unique set of skills and perspectives on “world marketplace, supervisor-subordinate relationships, cultural diversity, performance of tasks, and ways that communication and information technologies can be used to enhance organizational performance and maximize productivity” (Meng, Bryan, & Rogers, 2017, p. 70). Additionally, increasing online presence through platforms such as emails, social media, LinkedIn, and Indeed are great ways to attract millennials.

In order to recruit talent into the public sector, agencies must understand what millennials seek in their careers. Millennials are known for craving growth. Thus, millennials need to have challenging and engaging work, otherwise organizations run the risk of this generation becoming bored and seeking employment elsewhere. Organizations should maintain up-to-date technology in order to keep millennials efficient with their work and the ability to multi-task. Furthermore, millennials value the opportunity to participate in leadership development programs because not

only does it provide growth in their current position, but it also develops skills they can use in future leadership roles. In summary, organizations should practice the following to attract and retain millennials: “offer a diversified work environment; offer professional development opportunities; pay employees competitively; give recognition and positive reinforcement; engage in two-way communication; offer mentorship programs and check up on progress; express flexibility; stay current with technology” (Meng, Bryan, & Rogers, 2017, p. 77).

Organizational Culture

Effective succession management entails a culture change. For years, most organizations have been accustomed to filling vacancies as they occur; systemic succession planning requires a constant and strategic view of long-term talent needs for the organization. Organization culture needs to shift to one that facilitates learning and growth for employees within the agency. This change not only allows employees to accomplish their professional goals, but also benefits the goals of the organization (Ibarra, 2016).

In 2013, the City of Pismo Beach launched a program to revamp the organization’s culture due to their unprecedented turnover rate. The turnover was mostly due to a combination of retirements and pension reform. Furthermore, the city did not have a culture that retained its employees. The city’s solution was to

proactively and aggressively engage the staff to develop an employee culture that would retain excellent employees through higher job satisfaction, morale, and professional development, a focus on attracting the best and brightest individuals to open positions, an emphasis on customer service, and breaking down departmental ‘silos’ to encourage collaboration (Garcia, 2017, para. 5).

This program kicked off with a city-wide meeting where employees were broken up into teams of eight and preassigned to interdepartmental groups. Discussions included “articulating employees’ values; developing shared ownership in the city’s future; identifying what employees needed to be more effective; defining customer service expectations; and creating new relationships by breaking down department divisions” (Garcia, 2017, para. 9). The city aligned employee values with city goals in an effort to give employees a sense of meaning and purpose in the organization. A result of this culture change is that employees donate more time to the city for events and also request development training opportunities. An organization that has high employee morale will be able to retain employees; thus, resulting in a deeper bench for succession management.

Creating the culture of leadership development within an agency is essential to the success of an organization. A good leadership development program is one that becomes so engrained into an organization’s culture that it is able to withstand executive leadership change, fluctuation in resources, and reconstruction of the organization (Turner, 2007). According to Benest (2009), “Learning organizations are organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspirations are set free, and where people are continually learning to see the whole together” (p. 6). This can be done by (1) providing a strong rationale for learning; (2) promoting self-awareness; (3) offering learning opportunities; (4) providing hands-on trainings; (5) providing coaching resources; (6) encouraging employees to develop an annual learning plan; and (7) allowing for mistakes (Benest, 2009, p. 7).

Developing Leaders

According to Gothard and Austin (2012), “Formal succession planning can increase enthusiasm for work, reduce anxiety, and guard against selection bias during hiring processes” (p. 274). Recognizing and developing potential leaders from within an organization is essential to succession management (Gothard & Austin, 2012). An effective leadership development program focuses on developing the following three areas: (1) The technical knowledge of a leader; (2) How a leader interacts with others; and (3) What the leader actually does throughout the day (AON Hewitt, 2012). Additionally, organizations should be able to identify those who are ready to be leaders *now*, those who could take on a critical role *soon*, and those who an organization should *keep an eye on*. According to AON Hewitt (2012) “For leaders in each of these phases, appropriate leadership development actions should occur to ensure that a robust talent pipeline exists and individuals move through the readiness ‘stages’ at an appropriate pace” (p. 2). An organization should have one or two individuals designated in each category of leadership readiness mentioned above – a pool of talented leaders in development. This means that senior leadership must have succession management as a priority. In order to achieve this best practice, senior executives must have conversations among themselves and middle management regarding succession management throughout the year and commit to developing and tracking leaders in within their organization (AON Hewitt, 2012).

Talent management is a shift from traditional recruitment of elitists to work as senior executives in organizations, and rather a focus on developing potential leaders that better suit the ever-evolving environment of the organization. In order to attain successful succession management, organizations must begin “(1) the identification of key strategic positions within the organization that definitively and significantly contribute to the organization’s competitive

advantage, (2) development of a pool of qualified candidates, and (3) a ‘differentiated human resource architecture’ to simplify the process of filling key positions” (Meng, Bryan, & Rogers, 2017, p. 72). In essence, millennials require a different type of leadership development than that of prior generations. The millennial generation benefits from mentorship and networking; however, millennials also need skill development in order to one day attain a senior leadership role.

Best practices for succession management follow what is known as the *Four A’s* – alignment, accessibility, assessment, and advancement. Alignment requires the agency to focus on both the current and future needs of the organization, and to develop a talent pool of leaders to meet the organization’s long-term goals (AON Hewitt, 2012). Furthermore, alignment is directly linked with “hiring, performing management, development and retention systems” (AON Hewitt, 2012, p. 6). Management uses this process to identify and develop potential leaders, which ultimately contributes to succession management.

Keeping succession management strategies accessible is the key to success. This means the process must be simple, transparent, flexible, diverse and robust. Most organizations have a complex method for developing leaders, where managers spend more time filling out paperwork than engaging with the talent pool. Maintaining an uncomplicated leadership development process ensures consistency and simplicity. Additionally, modern-day practices allow for transparency in leadership development. Years ago, succession management and leadership development were conducted under secrecy and confidentiality. Transparency encourages clarity, integrity, and minimizes politics from interfering with leadership development and career growth. Agencies that practice transparency with succession management let their employees know how valuable they are to the organization. This allows the individual to know his or her

potential career opportunities within the organization and motivates them to develop their leadership skills (AON Hewitt, 2012).

Diversity in executive roles is an organizational strength; therefore, incorporating the inclusion of diversity into the talent pipeline is essential. According to AON Hewitt (2012), “this effort is twofold, favoring both the inclusion of women and ethnic minorities in developing the future talent pipeline, and identifying and developing future leaders who are adept at managing diversity” (p. 9). Lastly, succession management needs to be robust – that is, it needs to focus on developing leaders for all levels of management, not just on senior executive roles. Shortages in entry-level and middle management personnel can devastate an organization in the same way it can in executive management levels; therefore, organizations must ensure that they develop leadership capabilities at all levels (AON Hewitt, 2012).

Assessing the needed areas for management talent, in addition to developing the talent pool, is critical for succession management success. Best practices ensure that positions which are vital to the performance and health of an agency are targeted. Additionally, identifying the competency needs in specific roles helps to determine potential in current employees (AON Hewitt, 2012).

The last of the 4 A’s, advancement, ensures that the talent pool is exposed to leadership development opportunities to gain experiences that assist in advancing their careers. Elements of an effective succession management strategy “focus on advancing leaders by evaluating and addressing competency gaps, readiness, feedback, and development” (AON Hewitt, 2012, p. 11). It is more than just a one-time conference or annual evaluation – instead, effective succession management strategies create a process that develops future leaders.

Methodology

Design

The objective of this study was to identify what Santa Clara County local agencies are doing to create an effective talent pipeline for future leaders. As stated by Sylvia and Sylvia (2012), “Failing to plan is planning to fail” (p.27). In other words, effective planning has the ability to prevent a crisis from occurring and negatively impacting agencies. Adequate planning benefits an organization in many ways.

First, a plan defines the activities expected of organization’s members. Second, a good plan establishes criteria for managerial decision making. Third, a well-constructed plan permits evaluation. Fourth, planning can filter and organize the flow of information, controlling both the quality and quantity of the information gathered. Fifth, effective planning can minimize costs by smoothing workload fluctuations. Sixth, planning permits the agency to schedule tasks, personnel, facilities, outside contracts, and monetary resources. (Sylvia, R. & Sylvia, K., 2012, p. 28 - 29).

It is quite troublesome that the majority of Santa Clara County local agencies lack a formal succession plan or leadership development strategy (Rich, 2018). In an effort to collect the trends of what local agencies are doing to reduce the talent crisis, a process intervention model was used to assess the issue. Process intervention seeks to answer the following question: “if Y is not happening, what is wrong with X?” (Sylvia, R. & Sylvia, K., 2012, p. 93). If an adequate talent pipeline is not being implemented throughout local agencies in Santa Clara County, what is wrong with the agencies’ leadership development plan?

The four phases of process intervention include: (1) Problem identification; (2) Solution development; (3) Implementation; and (4) Feedback evaluation. Since the majority of Santa Clara County agencies do not have a robust succession plan in place, this study only used the

first two steps of the process intervention methodology. First, a review of literature examined the best practices for strategically planning a talent pipeline in local government agencies. Next, a leadership development questionnaire was sent out to local government agencies within Santa Clara County in order to identify the problem surrounding the talent pipeline, and discover what the trends and commonalities are pertaining to leadership development in local government agencies. Finally, solutions to the problem were proposed. Part 2 of this study consisted of a benchmark analysis which was conducted by administering a separate questionnaire to alumni of the Talent Management Exchange Program. This project has been registered with the Institutional Research Board (IRB) and is exempt.

Data

The following data was collected through Qualtrics, an online survey-tool. Participants in the survey were informed that their identities would remain anonymous, and that there is no right or wrong answer to the questions asked. In an effort to keep the study confined to like-organizations, the survey was administered to three departments within Santa Clara County local government agencies. The following departments received the questionnaire: (1) Human Resources (HR); (2) Public Works (PW); and (3) Parks, Recreation and Neighborhood Services (PRNS). Three individuals with the classification of Analyst 1 or higher (support staff, middle management, or executive management) were contacted from each department to participate in this study. Seeking data from individuals in local agencies was appropriate for this study because the research question focused on public agencies' programs for managing the exit of the baby boomer generation of employees. The above-referenced departments were from the public agencies listed in Table 1.

Table 1: Santa Clara County Local Government Agencies

	Public Agency	Population (2018 census bureau)	Urban Area	Medium City	Large City
1	City of Campbell	42,466	X		
2	City of Cupertino	60,170		X	
3	City of Gilroy	58,756		X	
4	Town of Los Altos	30,531	X		
5	Town of Los Gatos	30,680	X		
6	Los Altos Hills	8,559	X		
7	City of Milpitas	80,430		X	
8	City of Mountain View	83,377		X	
9	City of Morgan Hill	45,135	X		
10	City of Palo Alto	66,666		X	
11	Town of Monte Sereno	3,487	X		
12	City of Santa Clara	129,488		X	
13	City of San José	1,030,119			X
14	Santa Clara Valley Water District	1,930,000			X
15	City of Saratoga	30,599	X		
16	City of Sunnyvale	153,185		X	

Note: Although Santa Clara Valley Water District is not a municipality, it provides service to the entire Santa Clara County; therefore, it is listed under “large city” for service population.

The leadership development questionnaire was comprised of 23 multiple choice and short answer questions that were designed to gather information on how each agency is handling the issue of retirements and leadership development. Survey questions are listed in Appendix A.

Additionally, individuals who have participated in MTEP were contacted to participate in a questionnaire to assess how the program has impacted their careers and the organizations that they work for. MTEP survey questions are listed in Appendix C.

Sample

Leadership Development Questionnaire. This study sought opinions and feedback from employees of Santa Clara County local government agencies in effort to explore what these agencies are doing to manage the exit of baby boomer generation employees. Participants in the leadership development questionnaire (Appendix A) were located by researching the phone

numbers to each Santa Clara County local government agency's Human Resources Department, Public Works Department (or equivalent department), and Parks, Recreation and Neighborhood Services Department (or equivalent department). Next, a call was placed to each department in an attempt to obtain at least three email addresses for employees classified as an Analyst 1 or higher to participate in this questionnaire. The individual who answered the call determined the exact people to be surveyed. Finally, an email (Appendix B) was distributed to the prospective participant requesting him or her to participate in this study. Participants were given one month to respond to the survey. Two reminder emails were sent out prior to the closing date of March 12, 2020.

The leadership development questionnaire was distributed to 93 employees of various Santa Clara County local agencies. This questionnaire began by gathering general demographics, such as what local agency the participant worked for, what job title the participant held, how long the participant had been working in the public sector, and how long the participant had been working in the current department. The questionnaire then opened up to asking participants about the value of leadership development and how they believed their agency handles the talent pipeline and development of the next generation of leaders.

Of the 93 employees, 45 individuals responded, which is a 48% response rate. The survey revealed that 31% of participants had been working in the public sector for over 21 years. Additionally, the majority of participants, 67%, had been in their respective departments for only 1 – 5 years.

MTEP Questionnaire. This study sought to analyze the importance of implementing a leadership program; therefore, gathering data from alumni of MTEP also assisted in answering the research question. The MTEP questionnaire (Appendix C) was distributed via email

(Appendix D) to 21 alumni of the program. Participants from MTEP were contacted by collecting their emails from the publicly available MTEP website. This questionnaire was administered to alumni of MTEP to assess how the program has impacted their careers. This program is done through agencies within Santa Clara County as well as San Mateo County. Of the 21 MTEP alumni, 12 individuals responded, which is a 57% response rate.

Findings

Leadership Development

The following portion of this study breaks down how participants responded to each question. In addition, a graph demonstrating how support staff, middle management, and executive management viewed how leadership development is handled in their agency is attached to each response breakdown.

Question 1 (*What public agency do you currently work in?*) reveals which agencies participated in this questionnaire. The City of Gilroy had the most participants with seven participants. Three agencies had four participants, two agencies had three participants, and four agencies had two participants. Additionally, there was at least one participant from each agency.

Figure 1: *Question 1 Response Breakdown*

Question 2 (*What department do you currently work for?*) asked participants to disclose the department in which they worked. The survey revealed that participants were mostly from Human Resources department. HR personnel comprised 40% of participants, Parks, Recreation, and Neighborhood Services personnel comprised 23% of participants, Public Works personnel comprised 11% of participants, and 23% of participants were comprised of personnel from other departments.

The recruitment email invited participants to forward the questionnaire link to colleagues in their department whom they felt would have knowledge regarding leadership development. It appears that people made the decision that somebody else outside of their department was better suited to answer the question; thus, the link was emailed by participants to individuals in various departments, including the City Manager's Office and the Planning Department. Ten participants were from departments outside of this research's intended scope. Two participants opted out of answering this question. Although participants are not strictly from the Department of Human Resources, Department of Public Works, or Department of Parks, Recreation and Neighborhood Services, it does not skew the analysis since all participants are from a Santa Clara County public agency nonetheless.

Table 2: *Question 2 Response Breakdown*

Department	Choice Count	
Human Resources	40%	18
Public Works	11%	5
Parks, Recreation and Neighborhood Services	23%	10
Other	23%	10

Question 3 (*What is your job title?*) revealed a range of participants from Analyst 1 to Human Resources Director. One participant opted out of answering this question. Although there is not an even amount of responses within job classification, it was useful to analyze the differences in responses between support staff, middle management, and executive management.

Table 3: *Question 3 Response Breakdown*

Classification		
Support Staff	29.55%	13
Middle Management	25%	11
Executive Management	45.45%	20

Figure 2: *Question 3 Response Breakdown*

Question 4 (*How long have you worked in public service?*) reveals that 37.78% of participants had been working in the public sector for over 21 years, 24.44% of participants had been working in the public sector for 11 – 15 years, and 22.22% had been working in the public sector for 1 – 5 years. Only one participant had been working in the public sector for less than one year. All participants answered this question.

Figure 3: *Question 4 Response Breakdown*

Question 5 (*How long have you worked in your department?*) reveals that the majority of participants, 66.67%, had been in their respective departments for 1 – 5 years. Only 4% had been in their respective department for 16 – 20 years. All participants answered this question. These results are thought provoking because it shows that departments may be having issues retaining employees.

Figure 4: *Question 5 Response Breakdown*

Question 6 (*How are decisions made about successors for management roles in your agency?*)

reveals that about half of the participants, 47.73%, believe that their agency informally prepares future leaders (e.g., to allow for promotions from within). About 30% of participants believe that their agency typically waits until a position is vacated to begin thinking about planning for succession. One participant opted out of answering this question.

Table 4: *Question 6 Response Breakdown*

Question		Choice Count	
1	We informally prepare future leaders (e.g., to allow for promotions from within).	47.73%	21
2	When a position opens up, we rely on expediency to identify someone to fill it (in other words, whoever is most convenient can fill the position and there is no real leadership or succession plan in place).	6.82%	3
3	We have a documented, robust system to prepare future leaders.	9.09%	4
4	We typically wait until positions are vacated to begin thinking about planning for succession; then we engage in an extensive process to fill the vacancy.	29.55%	13
5	I don't know.	6.82%	3

Figure 5: *Question 6 Response Breakdown by Job Classification*

Question 7 (*Is there a strategy in place for recruiting, orienting, and developing new employees?*) reveals that 59.52% of participants believe that their organization only somewhat has a strategy in place for recruiting, orienting, and developing new employees, 35.71% of participants felt that their agency has a concrete strategy in place, and 4.76% felt that their agency does not have a strategy in place. Three participants opted out of answering this question.

Figure 6: *Question 7 Response Breakdown*

Figure 7: *Question 7 Response Breakdown by Job Classification*

culture, government basics, a 3-hour bus tour and overview of city operations. For developing new employees, the city offers in-person and virtual training on a wide variety of topics, including hundreds of e-learning courses that employees may take on paid time.”

- “We are a small city and we normally have an open recruitment. We have about 25 employees. By developing employees through professional development and internal training, it will allow us to have a succession plan in place and retain employees.”
- “Comprehensive onboarding process to include organizational culture orientation and professional development goal setting. While we desire a combo of technical KSAs related to the job, we also hire for soft skills with the thought that it is much easier to train on technical knowledge than to develop a new set of soft skills. Managers set professional development goals for employees and work with them to grow and advance their skills so they have the potential to advance in the organization. We have some flex staffed positions to allow employees to advance with experience - for example Planner I to Planner II or Engineer I to Engineer II or Accounting Assistant I to Accounting Assistant II. We have made some changes to our recruitment outreach to communicate to candidates about Gilroy's organizational culture and why candidates would want to work in the position. While we cannot be the highest paid employer around, we can offer a great work environment and professional development which is often more important than money.”
- “We do go through an extensive recruitment process to find the best candidate. On their first day they meet with HR to go over NH paperwork. We do send a check in list to their Supervisor which covers them showing them around, taking them to lunch, etc. HR holds a new employee tour once or twice a year to take New Hires to all the different City facilities and provide lunch so that they can be better acquainted with our facilities. We have an Oath

of office that we encourage them to invite their families to and they are formally introduced to the City. As for Developing new employees, this is where I think we fall apart.”

- “The Town participates in a countywide leadership development program that provides valuable and proven training to up and coming leaders. The Town develops talent internally through deliberate exposure to executive team meetings, attendance at council meetings, and follow up at executive debrief meetings. The Town participates in a local Leadership Los Gatos program where Town employees can gain experience alongside private sector employees, gaining experience, networks, etc.”

Question 9 (*Does your agency have a devoted process specifically for training new hires?*)

reveals that 40.91% of participants only somewhat feel that their agency has a devoted process specifically for training new hires, 34.09% of participants feel that their agency has a devoted process specifically for training new hires, and 25% of participants do not believe that their agency has a devoted process for training new hires. One participant opted out of answering this question.

Figure 9: *Question 9 Response Breakdown*

Figure 10: *Question 9 Response Breakdown by Job Classification*

Question 10 (*In your opinion, does your agency prefer competitive open recruitment rather than developing internal recruitment/promotion?*) reveals that 46.15% of participants believe that their agency prefers competitive open recruitment rather than developing internal recruitment/promotion, 30.77% of participants somewhat believe that their agency prefers competitive open recruitment rather than developing internal recruitment/promotion, and 23.08% do not believe that their agency prefers competitive open recruitment rather than developing internal recruitment/promotion. Six participants opted out of answering this question.

Figure 11: *Question 10 Response Breakdown*

Figure 12: *Question 10 Response Breakdown by Job Classification*

Question 11 (*Executive leaders in your organization initiate discussion about leadership development:*) reveals that the majority of participants, 54.76%, feel that executive leaders in their organization initiate discussion about leadership development, 26.19% feel that executive leaders in their organization somewhat initiate discussion about leadership development, and 19.05% feel that executive leaders in their organization do not initiate discussion about leadership development. Three participants opted out of answering this question.

Figure 13: *Question 11 Response Breakdown*

Figure 14: *Question 11 Response Breakdown by Job Classification*

Question 12 (*Discussions regarding leadership development include staff outside of executive leadership (e.g., middle management and line staff)*) reveals that the majority of participants, 51.28%, believe that discussions regarding leadership development include staff outside of executive leadership. Approximately 23% of participants do not believe that discussions regarding leadership development include staff outside of executive leadership. Six participants opted out of answering this question.

Figure 15: *Question 12 Response Breakdown*

Figure 16: *Question 12 Response Breakdown by Job Classification*

Question 13 (*The agency identifies potential talent and develops staff for middle management and senior executive positions:*) reveals that 42.86% believe that their agency identifies potential talent and develops staff for middle management and senior executive positions, 47.62% believe that their agency somewhat identifies potential talent and develops staff for middle management and senior executive positions, and 9.52% believe that their agency does not identify potential talent and develops staff for middle management and senior executive positions. Three participants opted out of answering this question.

Figure 17: Question 13 Response Breakdown

Figure 18: Question 13 Response Breakdown by Job Classification

Question 14 (*Employees have opportunities to develop their leadership skills (e.g., mentoring, education, a leadership program, etc.)*) reveals that the majority of participants, 71.11%, believe that employees have opportunities to develop their leadership skills in their organization. None of the participants believe that employees in their agency do not have opportunities to develop their leadership skills. All participants answered this question.

Figure 19: *Question 14 Response Breakdown*

Figure 20: *Question 14 Response Breakdown by Job Classification*

Question 15 (If yes, please describe:) reveals that a majority of public agencies in Santa Clara County offer tuition reimbursement and some form of program that develops employees.

Figure 21: *Word Cloud of Question 15 Responses*

Below are 12 of the highlighted responses:

- “It would be nice to have an opportunity to work out of class or serve in a management position somewhere in San Mateo County without having to leave the County.”
- “We do provide tuition reimbursement to employees in the amount of \$1000-\$1500 to take classes. We participate in the Santa Clara County Leadership Academy and exchange programs.”
- “I’ve heard of colleagues who have participated in leadership development activities, but it seems that they are ‘invitation only.’”
- “There are numerous training and professional development opportunities for staff. I can’t speak for all departments within the City on the mentoring and education they are provided.”

- “As stated earlier, the City offers multiple opportunities for employee development that includes in-house training, external training and development opportunities, internal academies and certificate programs, and tuition reimbursement and development funds.”
- “We participate in local and county wide leadership trainings.”
- “Depends on department as to the opportunities. Some are set up better to develop and promote.”
- “We do offer a variety of trainings for staff to attend and have found employees are receptive of the trainings and additional opportunities. We are currently working on developing a leadership/supervisory academy for our staff.”
- “We have a city-wide mentoring program. We also post opportunities for different trainings to develop Analyst level skills. Some MOAs have built in funds that can be used for education purposes.”
- “Staff can develop as many leadership skills as they'd like, but here it's not what you know - but who you know. A lot of internal staff get overlooked for promotions/leadership positions even if the person has all the "correct" leadership training.”
- “Supervisory training opportunities, occasional work-out-of-class opportunities.”
- “We do have a mentorship program and have started reviving the Learning and Development program which was dormant for a couple years or so. Employees are also encouraged to pursue outside education, but the process for that is somewhat confusing and/or challenging to figure out.”

Question 16 (*Middle management personnel are held accountable for coaching and developing their direct reports:*) reveals that 30.95% of participants believe that middle management personnel are held accountable for coaching and developing their direct reports, while 47.62% believe that middle management personnel are somewhat held accountable for coaching and developing their direct reports. Only 21.43% believe that middle management personnel are not held accountable for coaching and developing their direct reports. Three participants opted out of answering this question.

Figure 22: *Question 16 Response Breakdown*

Figure 23: *Question 16 Response Breakdown by Job Classification*

Question 17 (*Employees have individual development plans designed to support their personal career growth:*) reveals that about an equal number of participants believe that their agency provides, somewhat provides, and does not provide employees with an individual development plan designed to support their personal career growth. Six participants opted out of answering this question.

Figure 24: *Question 17 Response Breakdown*

Figure 25: *Question 17 Response Breakdown by Job Classification*

Question 18 (*What does your agency think is most essential in preparing the next generation of leaders?*) reveals that the majority of participants believe that their agency thinks a combination of transfer of knowledge with various factors is most essential in preparing the next generation of leaders. A review of the responses under “other” reveal that transfer of knowledge appears to be the common necessity in agencies, considering it was also the most selected singular choice in responses. It was interesting to read the responses which state that their agency does not have a position on what is most essential in preparing the next generation of leaders. In retrospect, there should have been an option for “all of the above” in response choices. One participant opted out of answering this question.

Table 5: *Question 18 Response Breakdown*

Question		Choice Count	
1	Learning conflict resolution strategies.	6.82%	3
2	Learning how to motivate a team.	4.55%	2
3	Communication skills.	18.18%	8
4	Transfer of knowledge.	38.64%	17
5	Other (Please specify):	31.83%	14

Below are six of the highlighted responses under “other”:

- “There is not one answer to this question; it is really a combination of things: leadership development, conflict resolution, communication, motivating others, accountability, problem solving, community engagement, etc.”
- “Combination of transfer of knowledge and learning how to motivate teams.”
- “Our current agency has no position sadly.”
- “Ideas to generate revenue opportunities.”
- “This has not been articulated.”
- “All of the above.”

Figure 26: *Question 18 Response Breakdown by Job Classification*

Question 19 (*What are the big needs in your agency to ensure that a talent pipeline exists?*)

reveals that 0% of participants believe that their agency has an adequate talent pipeline, and 35.56% believe that their agency needs to begin the discussion of leadership development and succession management. A review of the responses under “other” reveals that participants believe that hiring and promotion are essential in ensuring that a talent pipeline exists in their agency. All participants answered this question.

Table 6: *Question 19 Response Breakdown*

Question		Choice Count	
1	Have a coherent leadership development program or plan for employees.	28.89%	13
2	Begin the discussion of leadership development and succession management within my agency.	35.56%	16
3	Create and implement better recruitment strategies to attract potential future leaders.	20.00%	9
4	My agency has an adequate talent pipeline.	0%	0
5	Other (Please specify):	15.56%	7

Below are the responses under “other”:

- “Need to address commute, housing and high cost-of-living challenges.”
- “Make hiring and promoting from within a priority.”
- “There is little chance for advancement, and not much room to move up, as the staffing is bare bones.”
- “The pipeline has changed in the last few years due to the changes in retirement.”
- “Again, I believe this is a combination of efforts involving hiring and leadership development.”
- “Having adequate depth of talent in a small organization.”

Figure 27: *Question 19 Response Breakdown by Job Classification*

Question 20 (*Does your agency demonstrate that leadership development is important?*) reveals that a majority of participants, 51.11%, believe that their agency demonstrates that leadership development is important, while 40% believe that their agency somewhat demonstrates that leadership development is important. Only 8.89% believe that their agency does not demonstrate that leadership development is important. All participants answered this question.

Figure 28: *Question 20 Response Breakdown*

Figure 29: *Question 20 Response Breakdown by Job Classification*

Question 21 (*Does the agency have structured resources to develop the next generation of leaders?*) reveals that 48.84% of participants believe that their agency somewhat has structured resources to develop the next generation of leaders, 27.91% believe that their agency does not have structured resources to develop the next generation of leaders, and 23.26% believe that their agency has structured resources to develop the next generation of leaders. It would have been interesting to compare responses by the agency size. Two participants opted out of answering this question.

Figure 30: *Question 21 Response Breakdown*

Figure 31: *Question 21 Response Breakdown by Job Classification*

Question 22 (*Does the agency focus resources on developing the next generation of leaders?*)

reveals that the majority of participants, 52.38%, feel that their agency somewhat focuses resources on developing the next generation of leaders, 26.19% of participants believe that their agency does focus on developing the next generation of leaders, and 21.43% of participants believe that their agency does not focus on developing the next generation of leaders. Three participants opted out of answering this question.

Figure 32: *Question 22 Response Breakdown*

Figure 33: *Question 22 Response Breakdown by Job Classification*

Question 23 (*What other strategies do you want to highlight regarding the integration of new employees into the organization?*)

Figure 34: Word Cloud of Question 23 Responses

Below are seven of the highlighted responses:

- “I think the old paradigm has changed – if someone is talented there will be opportunities for advancement but probably will be with a different agency. The change in retirement structure has people moving from City to City for advancement. The entire upper management of the City of Sunnyvale went to Santa Clara a couple of years ago and brought many of the brightest minds with them. Sunnyvale routinely has hired mid-level managers from San Jose. Many times the different cities train someone for advancement – and the person bails with the skills somewhere else.”
- “Mentoring program is important. A formal orientation of City functions, facilities, appointed and elected officials would be helpful. At present, the new employee orientation consists primarily of reviewing the benefits package. Could be so much more.”

- “Encouraging managers and supervisors to take the time to plan out thoughtful onboarding within the department to include being ready for the new hire, planning out their assigned work and projects, regular team and one-on-one meetings, etc. to set the new employee up for success. Managers and supervisors need to take the time to get to know their employees and what motivates them and what they care about so they can tailor assignments and training accordingly to continuously motivate and inspire them to do their very best work in serving the public.”
- “We should have a more formal training program. We hire staff with a wide variety of backgrounds, and it would be helpful for everyone to have the same knowledge base.”
- “Depending on the department, new employees are seen as individuals simply filling a role in that department. Leadership succession must first start with a stable workforce, which tends to be difficult in public sector. Most recently, both our City Management and Human Resource teams seem to be providing leadership training opportunities to staff, which is a nice change of pace within a City that never seem to have such programs.”
- “There should be Management Development Programs within the same organization so employees can work in same agency in a different capacity. Avoids the primary agency feel that staff is fleeing for green pastures and losing an employee for three months with no benefit to them.”
- “It starts from the recruiting aspect. Currently, recruiting in local government is a challenge to find good quality candidates because we are competing with big tech companies such as, Google, Facebook and such. Where candidates get paid more and have more nice perks. I think local governments need to come up with a more innovative way of recruiting and retaining good quality employees.”

Management Talent Exchange Program (MTEP)

MTEP Question 1 (*When did you participate in the Management Talent Exchange Program?*)

Table 7: MTEP Question 1 Response Breakdown

Year	Choice Count
2011	2
2012	1
2013	1
2015	4
2017	3
2018	1

MTEP Question 2 (*How has the Management Talent Exchange Program impacted your career?*) reveals that the majority of participants believe that the MTEP has impacted their careers.

Table 8: MTEP Question 2 Response Breakdown

Question		Choice Count	
1	I received a promotion within a year of completing the program.	33.33%	4
2	I feel more confident taking on leadership roles.	50.00%	6
3	It has not impacted my career.	8.33%	1
4	Other (Please specify):	8.33%	1

Below is the response under “other:”

- “It helped provide time to consider my career goals and the steps needed to progress in my career.”

MTEP Question 3 (*What was the most valuable skill or tool that you gain from the program?*)

reveals that approximately 42% of participants felt that the MTEP taught them conflict resolution strategies, how to motivate a team, communication skills, and it boosted confidence in leadership abilities. Approximately 33% of participants felt that the MTEP boosted their confidence in their leadership abilities. Additionally, it appears that confidence was developed due to participants learning new skills by working outside of their scope of knowledge.

Table 9: *MTEP Question 3 Response Breakdown*

Question		Choice Count	
1	Learning conflict resolution strategies.	0.00%	0
2	Learning how to motivate a team.	0.00%	0
3	Communication skills.	8.33%	1
4	The program boosted my confidence in my leadership abilities.	33.33%	4
5	All of the above	41.67%	5
6	Other (Please specify):	16.67%	2

Below are the responses under “other:”

- “Comfort in working outside my knowledge zone.”
- “I gained greater self-confidence learning I can excel in any type of public administration environment. I had to learn a new field.”

MTEP Question 4 (Do you recommend the Management Talent Exchange Program to agencies that are trying to develop future leaders?) reveals that 100% of participants would recommend MTEP.

Figure 35: *MTEP Question 4 Response Breakdown*

After completing the questionnaire, a participant provided additional feedback via email:

“I think that the MTEP could have been done within the County of San Mateo and resulted in a work-out-of-class position to provide an opportunity for demonstrating the quality of work in a new management role. The experience does not have needed to be done out of agency, but it should be an option.”

Limitations

A limitation to this study is that the analysis was solely qualitative. Furthermore, the study was limited due to the amount of data collected and the response rate to the questionnaires. The amount of support staff, middle management, and executive management respondents were not equal; therefore, it was not an adequate representation of the differences or similarities in thoughts about the talent pipeline against the three job classifications. Additionally, the amount of responses from each agency was not equal. Some agencies had over four participants while multiple agencies only had one participant. Furthermore, small agencies may not have access to

equal leadership development resources that medium agencies or large agencies have; therefore, their responses may be reflective of the lack of accessibility to resources versus their agency's view on leadership development and/or promotion from within. Another limitation was that some participants did not answer each question. In retrospect, it would have been interesting to collect demographics from respondents pertaining to whether they considered themselves a baby boomer, Generation Xer, or millennial. Nevertheless, the collective data helped answer this study's research question.

Analysis

The intent of this research was to collect the trends of what local government agencies in Santa Clara County are doing to reduce the talent crisis caused by the Silver Tsunami within the public sector, and to analyze what Santa Clara County local agencies are doing to prepare and develop new leaders. This study began by reviewing literature pertaining to knowledge management, generations at work, attracting and retaining millennials to the public sector, organizational culture, and developing leaders. The Findings section revealed what local agencies in Santa Clara County think of leadership development and what the trends are regarding the talent pipeline. The Findings section also produced feedback regarding a leadership development program from MTEP alumni. The following section will conduct the first two phases of the process intervention methodology regarding the talent pipeline in Santa Clara County local agencies and then conclude the analysis by benchmarking MTEP.

Part I: Process Intervention

Phase 1: Problem identification. This study identified the problem as Santa Clara County local government agencies lacking an adequate talent pipeline, and sought to understand what is missing within the agencies' leadership development plan. This study demonstrates that Santa Clara County local government agencies have a preference for open competitive recruitment rather than developing internal recruitment/promotion from within. Multiple respondents voiced their concerns of there being few opportunities for advancement within their agency and expressed the importance of leadership development. The questionnaire also revealed that leadership development and succession planning would benefit any Santa Clara County local government agency, regardless of its size.

It was also interesting to see that although the majority of respondents believe that their agency demonstrates that leadership development is important, many of those same agencies did not have a robust leadership development plan. The lack of a talent pipeline, combined with the need and desire for leadership development within organizations, demonstrates that leadership development best practices need to be developed and implemented throughout the county.

Furthermore, this study shows that public agencies across the county struggle with employee retention. As seen in the Findings, the majority of respondents worked for their current department between 1 – 5 years. This can be attributed to the lack of employee morale within the department, or possibly due to employees seeking better opportunities elsewhere. The Literature Review revealed that employee morale, leadership development, and employee retention correlate with one another.

Question 6 of this study revealed a disparity between the different levels of job classification and how succession management is handled within their respective agencies. The majority of executive managers believed that their agency informally prepares future leaders (e.g., to allow for promotion from within), whereas about half of the support staff believe that their agency typically waits until a position is vacant to begin thinking about succession planning, and the other half support the latter. Although the number of respondents within job classifications is not evenly distributed across levels in this study, the disparity shows a disconnect between what executive managers think is occurring within their agency and what support staff experience.

The leadership development questionnaire provided useful information with regard to what Santa Clara County local agencies are doing to prepare for the Silver Tsunami and develop their talent pipeline. It appears that most agencies are informally discussing succession

management and have some form of leadership development program; however, as seen in the Findings, not a single respondent believed that their agency has an adequate talent pipeline.

Phase 2: Solution Development. This section of the Analysis provides two solutions to the issues regarding the lack of talent pipeline in Santa Clara County local agencies. The solutions aim to address the issues without implementing drastic change to how these organizations are structured and operate.

Encourage Participation in a Leadership Development Program. As seen in the Findings, many agencies have some form of leadership development program; however, few have a robust system in place to prepare future leaders. Furthermore, participation in a leadership program should not be invitation only. Employees should be able to express interest and be afforded the opportunity to participate in a leadership development program. Additionally, many respondents believe that the transfer of knowledge is essential for the success of their agency. Providing mentorship opportunities does just that. A benchmark analysis of MTEP will be conducted in Part II of the Analysis.

Revamp Hiring Process. A theme seen in the Findings shows that employees are desiring agencies to hire from within; however, the majority of agencies prefer open competitive recruitment. It is recommended that agencies develop the flexibility to promote from within.

Part II: Benchmarking

Findings of the MTEP questionnaire reveal 100% of MTEP alumni would recommend the program to agencies that are trying to develop future leaders. Below, Figure 36 provides a Strengths, Weaknesses, Opportunities, and Threats Analysis (SWOT) of MTEP.

Figure 36: *SWOT Analysis of MTEP*

Internal Factors	
Strengths	Weaknesses
<ul style="list-style-type: none"> • Knowledge management • Talent retention • Provides participants with the ability to work in an area outside of their knowledge base and/or comfort zone • Can develop leaders at a low cost • Hosting agency gains new talent for three months • Provides coaching to participants from local public agency leaders • Networking opportunity • Develops leadership skills • Recommended by 100% of MTEP alumni 	<ul style="list-style-type: none"> • The amount of required resources and time • Removes an employee from original agency to transfer to a different agency for three months • Not all local agencies participate
External Factors	
Opportunities	Threats
<ul style="list-style-type: none"> • Silver tsunami is creating vacancies in leadership positions which need to be filled • Public agencies need more leaders in the workforce • The workforce is transitioning to be comprised mostly of millennials; therefore, organizational culture is shifting towards mentoring 	<ul style="list-style-type: none"> • Can lose a participant to a different agency that offers more advancement after the individual develops their leadership skills through MTEP • Potential decrease or loss in funding since the program relies on multiple sources • Not enough qualified people are seeking employment in the public sector because the private sector pays more • Loss of organizational management may result in a reduction of resources for training participants

Strengths. Participating in MTEP provides local agencies with employees who are well-rounded and more confident in their leadership abilities. Additionally, MTEP is cost effective. Not only does the program obtain funding through three sources outside of the participating agency, but it allows for hosting agencies to use MTEP participants to complete projects which agencies otherwise would not have the resources for. This program is county-wide and extends beyond Santa Clara County and into San Mateo County. Participants are able to expand their skillset and network while hosting agencies benefit from having an employee that may provide the agency with a unique set of skills.

Furthermore, agencies that participate in MTEP have an organizational culture which fosters leadership development and growth. As seen in the Literature Review, a good leadership development program is so integrated in the organization that the agency becomes able to withstand executive leadership change, fluctuation in resources, and reconstruction of the organization. Enrolling employees into the leadership program reduces accidental organizational forgetting because leadership employees are able to develop relationships with more junior employees. MTEP provides emerging leaders, which is presumably becoming more millennials, with the opportunity to take on a challenge and grow within their careers. Additionally, survey results show that alumni of MTEP leave the program with better conflict resolution strategies, skills to motivate a team, improved communication skills, and enhanced confidence in their leadership abilities. As previously mentioned, millennials need to have challenging and engaging work, otherwise organizations run the risk of this generation becoming bored and seeking employment elsewhere. MTEP not only assists with knowledge management, but also contributes to talent retention.

Weaknesses. As seen in the Findings, MTEPs biggest weakness is that the program removes employees from their organization and transfers them to another public agency for three months. This move may be disruptive to the participant's home agency. This also does not help to foster the relationships that are needed for knowledge transfer. Furthermore, participants of MTEP may be transferred to an agency outside of their original county (e.g., a participant may work in Santa Clara County but be hosted in San Mateo County for the program). An additional weakness to MTEP is the amount of time and resources that it takes from both the participating agency and hosting agency to run the program. Also, MTEP is only offered to small and medium sized local agencies. There are many pieces that need to work together for the program to be successful, beginning from the application stage. Although the program's objective is important for its participating agencies, it may unintentionally take resources that are needed to accomplish the participating agency's mission.

Opportunities. The Literature Review revealed that public agencies are experiencing a wave of retirements and loss of valuable expertise due to the Silver Tsunami. This departure of experienced employees not only removes a number of senior executives from the public sector, but also results in the loss of institutional knowledge. Although this is a talent crisis, this creates an opportunity for millennials to develop their leadership skills and network so that these vacancies can be filled. Additionally, since the workforce is transitioning into a majority millennial phase, workforce culture is also transitioning to one of mentorship and development training. The research demonstrates that this shift in culture results in employees donating more time to the city for events and fosters morale and loyalty. Providing employees with the opportunity to participate in MTEP not only results in employee retention but also a deeper

bench for succession management. Exterior factors support agencies participating in leadership development programs like MTEP.

Threats. With the Silver Tsunami removing managers from the public sector, this limits the amount of resources readily available to mentor MTEP participants as well as work behind the scenes. Another potential threat would be the loss of funding since the program relies on multiple sources. Furthermore, despite MTEP providing emerging leaders with tools to develop their leadership skills while simultaneously networking, a threat emerges to participating agencies due to the private sector's competitive market. The study revealed that employees of the public sector make 11% - 12% less than their peers in the private sector. Not only is the public sector not attracting millennials to begin their careers the way that the private sector has, but the public sector also loses employees to the private sector due to better opportunities for advancement and competitive pay. Findings from this study also revealed that employees tend to not stay with their local public agency department for longer than five years. This can be attributed to employees seeking better opportunities elsewhere. However, if an MTEP alumnus seeks advancement in his or her career elsewhere, but remains within the public sector, then it is not a loss or considered as wasted resources.

Action Items and Goals. It is recommended that MTEP continue its leadership development program but expand to also include large cities. Although the program may disrupt the participating agency that loses an employee for three months, the benefits far outweigh the costs. The need to have developed leaders in the public sector to replace the positions left vacant due to the Silver Tsunami means that a small three-months sacrifice can benefit an organization and the public service as a whole in the future.

Conclusion

This study explored what Santa Clara County local agencies are doing to prepare for and cope with the Silver Tsunami. As seen in the Literature Review, the public sector has the oldest average aged workforce in any industry; thus, the need to prepare future leaders is imperative for local public agencies to be able to adequately serve their communities. Local public agencies must allow their organizational culture to shift towards systemic succession planning in order to prevent accidental forgetting and encourage leadership development. Additionally, local agencies need to work on attracting the next generation of leaders to the public sector. The Literature Review discussed diversified work environment, room for growth and development, the use of up-to-date technology, and providing meaningful work. Leadership development programs such as MTEP provide future leaders with the tools needed to grow in their careers, and to help to develop participants' confidence in their ability to be successful with challenging tasks outside of their knowledge base. As previously mentioned, not only does this help the employee's personal growth, but it also contributes to accomplishing the goals of the organization.

The findings show that leadership succession begins with a stable workforce; unfortunately, that is not the current reality of the public sector. The analysis recommended that (1) local agencies encourage their employees to participate in a leadership development program and (2) revamp the hiring process to not only support internal promotion, but to also attract, develop, and retain future leaders.

This research is important because Santa Clara County local public agencies need to ensure that they have a deeper bench for succession management. The lack of adequate succession planning and leadership development is an issue that must be addressed, not merely

because of the big difference between baby boomers and millennials, but because this issue can be repeated as the next generation of workers retires and a new generation enters the workforce. Understanding the differences in generational characteristics while developing leadership skills is a culture that must be developed within local public agencies. This research in Santa Clara County may help local government agencies in other areas of the state to adopt some leadership development strategies for their communities' benefit.

Appendices

Appendix A: Leadership Development Questionnaire

1. What public agency do you currently work in?
2. What department do you currently work for?
3. What is your job title?
4. How long have you worked in public service?
 - a. Less than 1 year
 - b. 1 – 5 years
 - c. 6 – 10 years
 - d. 11 – 15 years
 - e. 16 – 20 years
 - f. 21+ years
5. How long have you worked in your department?
 - a. Less than 1 year
 - b. 1 – 5 years
 - c. 6 – 10 years
 - d. 11 – 15 years
 - e. 16 – 20 years
 - f. 21+ years
6. How are decisions made about successors for management roles in your agency?
 - a. We informally prepare future leaders.
 - b. When a position opens up, we rely on expediency to identify someone to fill it.
 - c. We have a documented, robust system to prepare future leaders.
 - d. We typically wait until positions are vacated to begin thinking about planning for succession; then we engage in an extensive process to fill the vacancy.
 - e. I don't know
7. Is there a strategy in place for recruiting, orienting, and developing new employees?
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know
8. If yes, please describe below:
9. Does your agency have a devoted position specifically for training new hires?
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know
10. In your opinion, does your agency prefer competitive open recruitment rather than developing internal recruitment/promotion?
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know

11. Executive leaders in your organization initiate discussion about leadership development:
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know
12. Discussions regarding leadership development include staff outside of executive leadership (e.g., middle management and line staff):
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know
13. The agency identifies potential talent and develops staff for middle management and senior executive positions:
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know
14. Employees have opportunities to develop their leadership skills (e.g., mentoring, education, a leadership program):
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know
15. If yes, please describe:
16. Middle management personnel are held accountable for coaching and developing their direct reports:
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know
17. Employees have individual development plans designed to support their personal career growth:
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know
18. What does your agency think is most essential in preparing the next generation of leaders?
 - a. Learning conflict resolution strategies
 - b. Learning how to motivate a team
 - c. Communication skills
 - d. Transfer of knowledge
 - e. Other (please specify):

19. What are the big needs in your agency to ensure that a talent pipeline exists?
 - a. Have a coherent leadership development program or plan for employees.
 - b. Begin the discussion of leadership development and succession management within my agency.
 - c. Create and implement better recruitment strategies to attract potential future leaders.
 - d. My agency has an adequate talent pipeline
 - e. Other (please specify):
20. Does your agency demonstrate that leadership development is important?
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know
21. Does the agency have structured resources to develop the next generation of leaders?
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know
22. Does the agency focus resources on developing the next generation of leaders?
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know
23. What other strategies do you want to highlight regarding the integration of new employees into the organization?

Appendix B: Leadership Development Questionnaire Recruitment Email

Dear [name],

My name is Nadia Webster and I am a graduate student at San Jose State University in the Public Administration Program. I am in the process of writing my final research project to fulfill the requirements for my master's degree. This research will explore the implications of the wave of retirements of Baby Boomers from senior executive roles within the public sector and analyze what Santa Clara County local agencies are doing to prepare and develop leaders. The study will look to answer the following: How can Santa Clara County local agencies develop the next generation of leaders as Baby Boomers exit the workforce?

I am reaching out to you in hopes that you will participate in a short questionnaire regarding leadership development in your organization. Your identity will remain anonymous. Additionally, there are no right or wrong answers to the questions.

Thank you for your time and I look forward to your feedback. It would be much appreciated if you could complete the questionnaire by the end of February as my project is due in April and I need time to analyze the data. Additionally, Please feel free to forward this questionnaire to anyone in your department who may have knowledge regarding this topic. For this study, I am targeting analysts, management, and directors of public agencies within Santa Clara County. Having an adequate number of participants in this questionnaire will be very helpful for this study.

Below you will find the link to the questionnaire:
https://sjsu.qualtrics.com/jfe/form/SV_9t4z7L3WmLEDkzP

Again, thank you.

Best,

Nadia Webster

Appendix C: MTEP Questionnaire

1. When did you participate in the Management Talent Exchange Program?
2. How has the Management Talent Exchange Program impacted your career?
 - a. I received a promotion within a year of completing the program.
 - b. I feel more confident taking on leadership roles.
 - c. It has not impacted my career.
 - d. Other: (please specify)
3. What was the most valuable skill or tool that you gained from the program?
 - a. Learning conflict resolution strategies
 - b. Learning how to motivate a team
 - c. Communication skills
 - d. The program boosted my confidence in my leadership abilities
 - e. All of the above
 - f. Other (please specify):
4. Do you recommend the Management Talent Exchange Program to agencies that are trying to develop future leaders?
 - a. Yes
 - b. Somewhat
 - c. No
 - d. I don't know

Appendix D: MTEP Questionnaire Recruitment Email

Dear [name],

My name is Nadia Webster and I am a graduate student at San Jose State University in the Public Administration Program. I am in the process of writing my final research project to fulfill the requirements for my master's degree. This research will explore the implications of the wave of retirements of Baby Boomers from senior executive roles within the public sector and analyze what Santa Clara County local agencies are doing to prepare and develop leaders. The study will look to answer the following: How can Santa Clara County local agencies develop the next generation of leaders as Baby Boomers exit the workforce?

I am reaching out to you in hopes that you will participate in a short 4-questions questionnaire regarding your time in the Talent Management Exchange Program. Your identity will remain anonymous. Additionally, there are no right or wrong answers to the questions.

Thank you for your time and I look forward to your feedback. Please feel free to forward this questionnaire to peers who may have participated in MTEP. I will be sending this out to the email addresses published on the MTEP webpage, but if you could send this out to anyone else who is not listed, it would be greatly appreciated. Having an adequate number of participants in this questionnaire will be very helpful for this study.

Below you will find the link to the questionnaire:
https://sjsu.qualtrics.com/jfe/form/SV_3TKQ4pTsuZRSp0N

Again, thank you for your help!

Best,

Nadia Webster

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