

# *SUCCESSION PLANNING FOR THE COMING HR CHALLENGE: THE SILVER TSUNAMI*

Dr. G. M. Cox, Chief (Ret.)

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- ❧ Thank you to the TMHRA for inviting me to attend the Annual Conference.
- ❧ This topic is SO important – what's coming is nothing short of a crisis.
- ❧ I am also thrilled to be able to visit with you on a topic that has grown to not only near and dear to my heart, but has huge implications for our missions, across the board, to serve the public



*FROM THE “GREAT  
RESIGNATION” TO THE “GREAT  
STAY”*



*HOWEVER,  
ACCORDING TO  
GALLUP, OVER  
50% OF CURRENT  
WORKERS ARE  
WILLING TO  
CHANGE  
EMPLOYMENT*

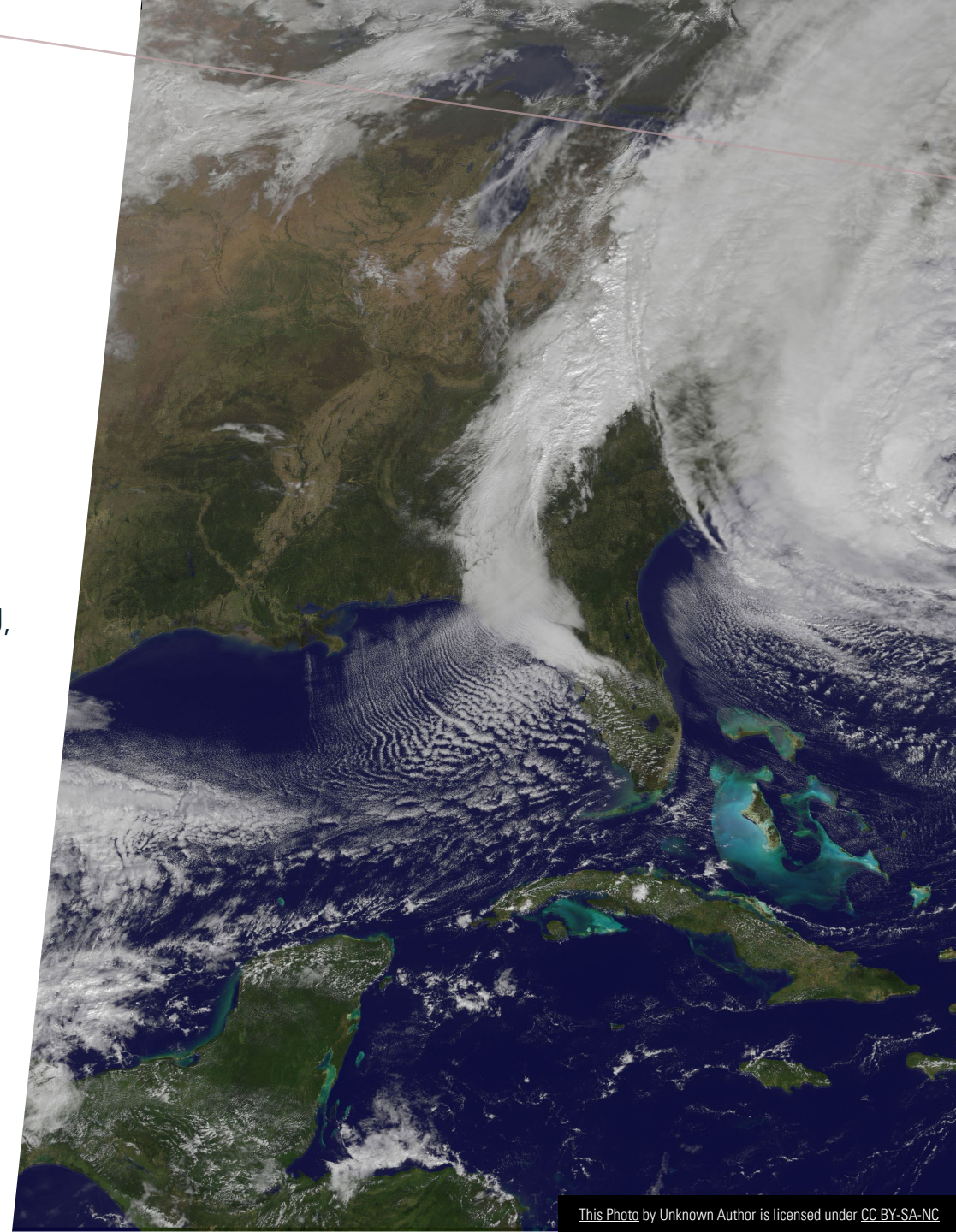
*WHY?*





# *SILVER TSUNAMI*

- Merging of Three perfect storms
- Aging Baby boomers – retirements
- Aging Gen Xers – retirements
- Fewer People Wanting to Work in Government Service (the federal process we're going through right now is not helping with the idea of job security at any government level)
- Vacancies need filling– September 2018 – the number of jobs exceeded active job seekers (WSJ, 09/12/18)(Competition among all sectors – public and private to include non-profits)
- Change in Service Demands based on these demographics
- Medical needs increasing – outstripping demand
- Social and emotional needs of aging Baby Boomers will challenge policing
- Aging Citizen: Services/Demands/Inadequate medical staff or nursing home facilities to handle coming demand – no familial care





*REMEMBER, YOU DO NOT HAVE TO REPLACE THEM IF THEY DO NOT LEAVE!*

- FOCUS ON RETENTION TACTICS
  - ARE SUPERVISORS AND MANAGERS MANAGING IN A HUMANISTIC WAY?
  - ARE YOUR EMPLOYEES ENGAGED (DEFINE)
  - IS UPPER MANAGEMENT ENGAGED AND APPROACHABLE?
  - IS LEADERSHIP COMMITTED TO EMPLOYEE SATISFACTION?
  - HOW DOES IT FEEL TO WORK IN YOUR CITY?
  - WHAT'S THE VIBE?





# *WHAT WE NEED IS A PARADIGM SHIFT*

- We cannot get out of this problem – recruiting and retention – with the same thinking that got us into this mess. (Paraphrased from Albert Einstein)
- Clear paradigm shift is needed:
- STOP RECRUITING AND START SELLING
- We continue to recruit/retain with the same model utilized to recruit/retain Baby Boomers and Gen X -- this model does not resonate with the younger Gen Y and Gen Z (aka “Zoomers”) generations (Gen Alpha is next)

# *EMPLOYEE ENGAGEMENT*

*THIS MEANS THAT EMPLOYEES ARE PHYSICALLY  
AND MENTALLY PRESENT AND PREPARED TO WORK  
TOWARDS THE STATED GOALS AND OBJECTIVES OF  
THE ORGANIZATION IN A POSITIVE WAY*





# *WHAT THEY (GEN Y & Z) WANT FROM A CAREER (JOB)?*

- Purpose
- Prestige (explain)
- Make a difference – “Be the Difference”
- Doing good
- Service
- Pay and Benefits (Gen Z has flipped the script on P&B)
- We do not sell this very well – focus on delivering to this talent pool what they want from their “career”

A word cloud of factors Gen Y and Z want from a career. The words are arranged in a vertical stack, with some overlapping. The words are: job itself, Career deve, Other, Tools and equipment, Technology, Pay, Management, Training, Job, Customer service, Commun, ge, Equal opportunities, Community, Work environ, and Business Stra.

job itself  
Career deve  
Other  
Tools and equipment  
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ge  
Equal opportunities  
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Business Stra

# *PAY TO STAY OR PAY TO GO*

- A novel idea is to offer a probationary employee a “buy out” at the end of probation to LEAVE. “If you want to resign your position now, we will give you a one-time payment of \$\_\_\_\_\_.”
  - Why this works – if they do not want to be there, you do not want them there
  - Takes a great deal of faith to do this
  - But this is a strategic move, not a tactical one (short-range)
- Another idea is to offer a qualified and desirable employee who has expressed a desire to leave (or submitted a resignation) a one-shot pay supplement to STAY.
  - The logic behind this one is that it will cost you money to advertise, interview, process, hire and train (and this does not recover the costs related to loss of experience, expenses spent to train, etc.) the employee’s replacement
  - What is your ROI?
  - Establish terms and conditions – what do you have to lose?
  - This will have long-range impacts on this employee and the city
    - Commitment
    - Dedication
    - Motivation



# *LOOK AT YOUR WEB PAGE*

- Is it current? Make sure it is up to date
- Make it fast
- Easy to navigate
- Emphasize relationships
- Clear message from the CEO (city manager or mayor)
- Have phone numbers for contact clearly indicated, especially for HR
- Focus on work-life balance (family first policies and practices)
- Your “Career Opportunities” link must be clearly visible and at the top of the page (DO NOT SAY “JOBS”)
- Allow on-line applications





# *PAY AND BENEFITS*

- With the newest generations, this priority has shifted up... (post-COVID)
  - You have 3 choices when it comes to salary
    - Lead
    - Meet (average)
    - Lag
  - Money isn't everything, but it is important
  - Where is your city/department?
  - You must be competitive
  - Salary/Benefits Study – every year now, but at least every 3 to 5 years



# *VARIOUS GENERATIONAL GROUPS*





# *GENERATIONS*

- The Silent Generation (1925 to 1945)
- Baby Boomers (1946 to 1963)
- Generation X (1964 to 1982)
- Generation Y (1983 to 1996) (\*My research suggested 2000 as the cut line)
- Generation Z (1997 to 2012) (\*My research suggested 2001 to 2020)
- Generation Alpha (2013 - 2025)
- Generation Beta (2025-2039...)
- Each generation tend to have their own characteristics – yet are similar in many ways
- Note: Demographers differ on exact cut lines for each generation, but rule of thumb is that a generation is between 15 to 22 year bands
- Careful – do not over generalize (Ecological fallacy)



- Between 24 and 42 years of age now
- The first high tech generation/ DotCom Gen
- Generation ME
- Millennials
- Raised by Baby Boomers and older Gen X
- Demand work-life balance
- Family First Policies
- Money is NOT the most important thing to them – the Great Recession Had an impact (2008)
- Overshare – get ready for drama
- Parents involvement in Career Decisions

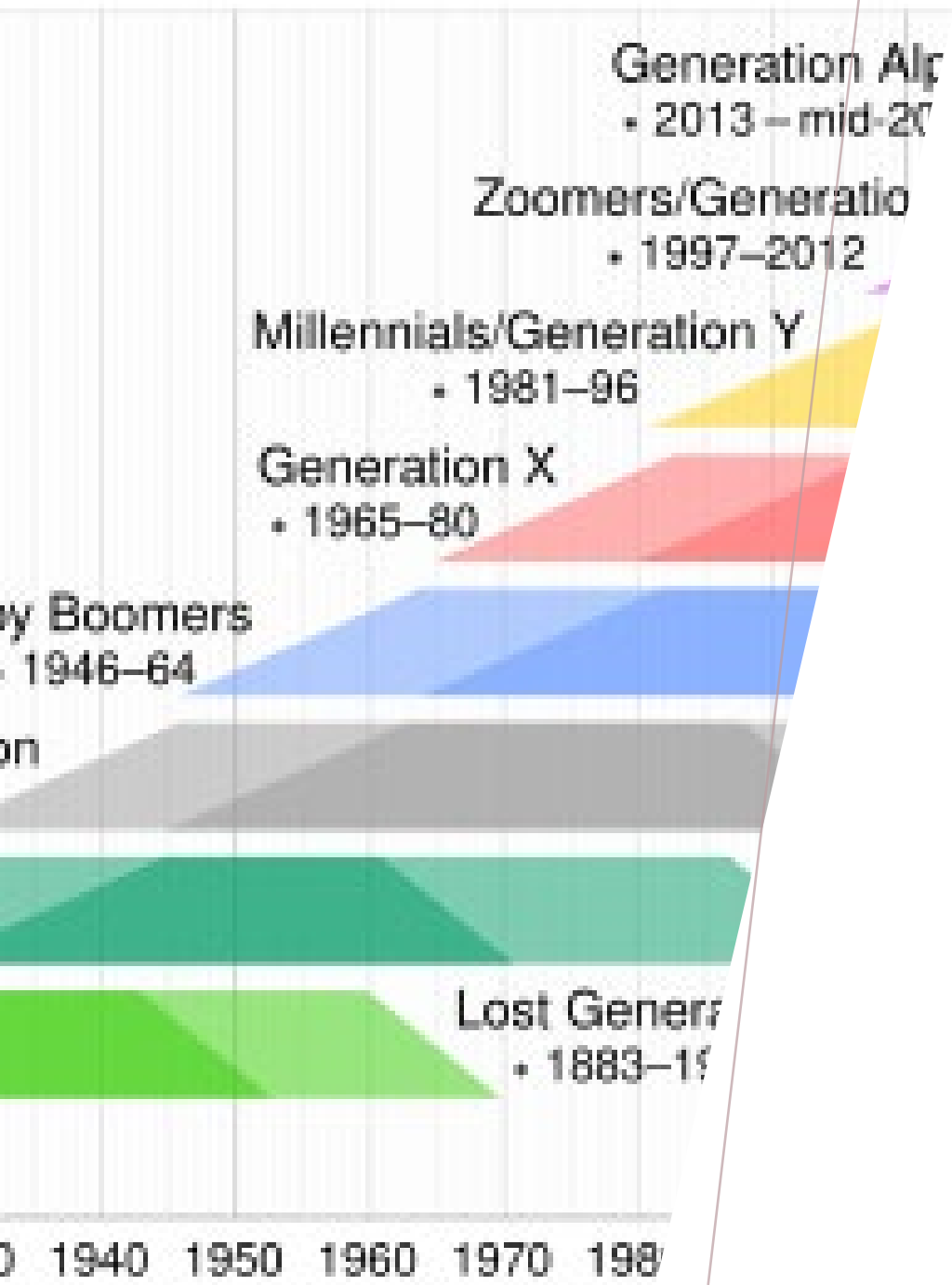




# *GEN Z CHARACTERISTICS*

- Old souls in young bodies: more in common with grand parents
- Hardworking
- Financially responsible
- Independent
- Determines
- Multi-taskers
- Progressives
- Never known a world without war or terrorism
- Money, career advancement, and education
- Post Great Recession – value stability – financial stability – value money and want to be fairly compensated for work – it is a motivator
- Being progressives, they value stands on human equity issues (racial, sexual orientation, etc.)
- Show that you value them (goes to prestige as well as self-worth)
- Value influencers – can smell BS a mile away – be sincere – they value trust
- Turn-offs – talking down to them or treating them like kids
- Highly digital, technically savvy and highly MOBILE





# *GENERATION ALPHA*

- The good news – this generation cohort hasn't been described
- And, they are not ready to work for a couple of years
- However, I would suggest you start studying this group now
- Read any book by Dr. Jean Twenge

# *WHY DO PEOPLE CHOOSE PUBLIC SECTOR JOBS?*

- Are the people who choose to work in public sector jobs motivated differently than other applicants?
- Do you think that the idea of “needing a job” is sufficient motivator to hire an applicant?
- You may need to rethink this...do you really think that the “Job” you are offering is the end-game for the applicant?

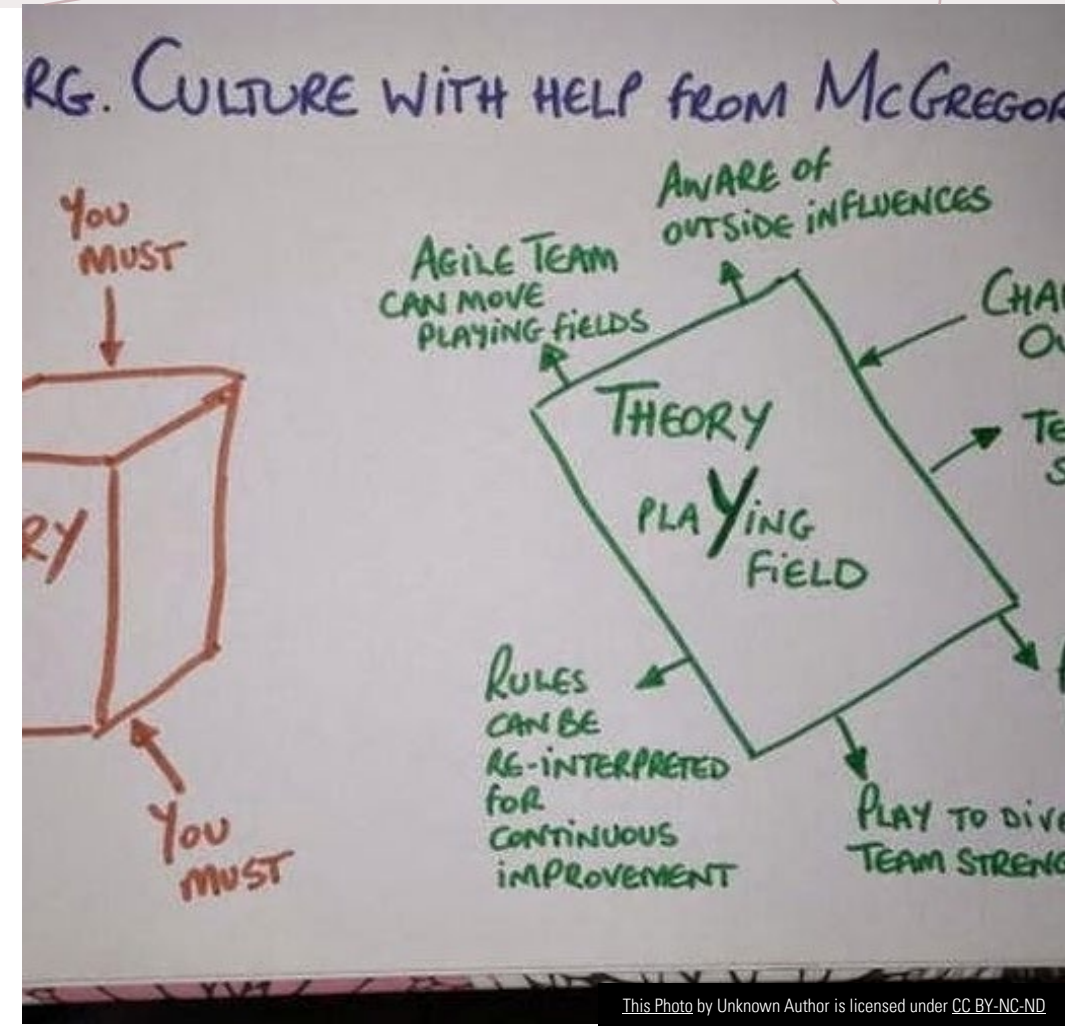


# *WHAT MOTIVATES?*



# *THEORY X VERSUS THEORY Y (MCGREGOR)*

- Theory X: The Negative assumptions about employees (Lazy, unmotivated, needs constant supervision, etc.)
- Theory Y: The Positive assumptions about employees (energetic, motivated to do work, engaged, people are competent and trustworthy, etc.)





# *HIERARCHY OF NEEDS*

*(MASLOW, 1943, IN REVERSE)*

- Physiological (Shelter, Food, Water, Air)
- Safety (Personal security, property, employment, health)
- Love and belonging (Friendship, intimacy, family, sense of connection)
- Esteem (Respect, self-esteem, status, recognition, strength, freedom)
- Self-actualization (desire to become the most one can be)



# *TWO FACTOR HYGIENE THEORY*

## *HERZBERG (1957)*

- External Factors (hygiene) – dissatisfaction
  - The absence of dissatisfaction is NOT motivation – it is the absence of dissatisfaction
  - Should the workplace pay attention to an employee's happiness?
  - Do happy cows make more milk?
- Internal or intrinsic factors – motivation
  - The Key is that motivation is internal to the employee
  - Employers can facilitate or try to instill motivation, but in the end, it is up to the employee

## Herzberg's Two-Factor Theory



# *PSM (PERRY AND WISE)*

- Public Service Motivation
- People who want to work in the public sector are motivated to make a difference, serve the public and serve for the greater good.
- They have a “servant heart”
- Money is a variable, but not the primary motivator (refer back to Maslow and Herzberg)

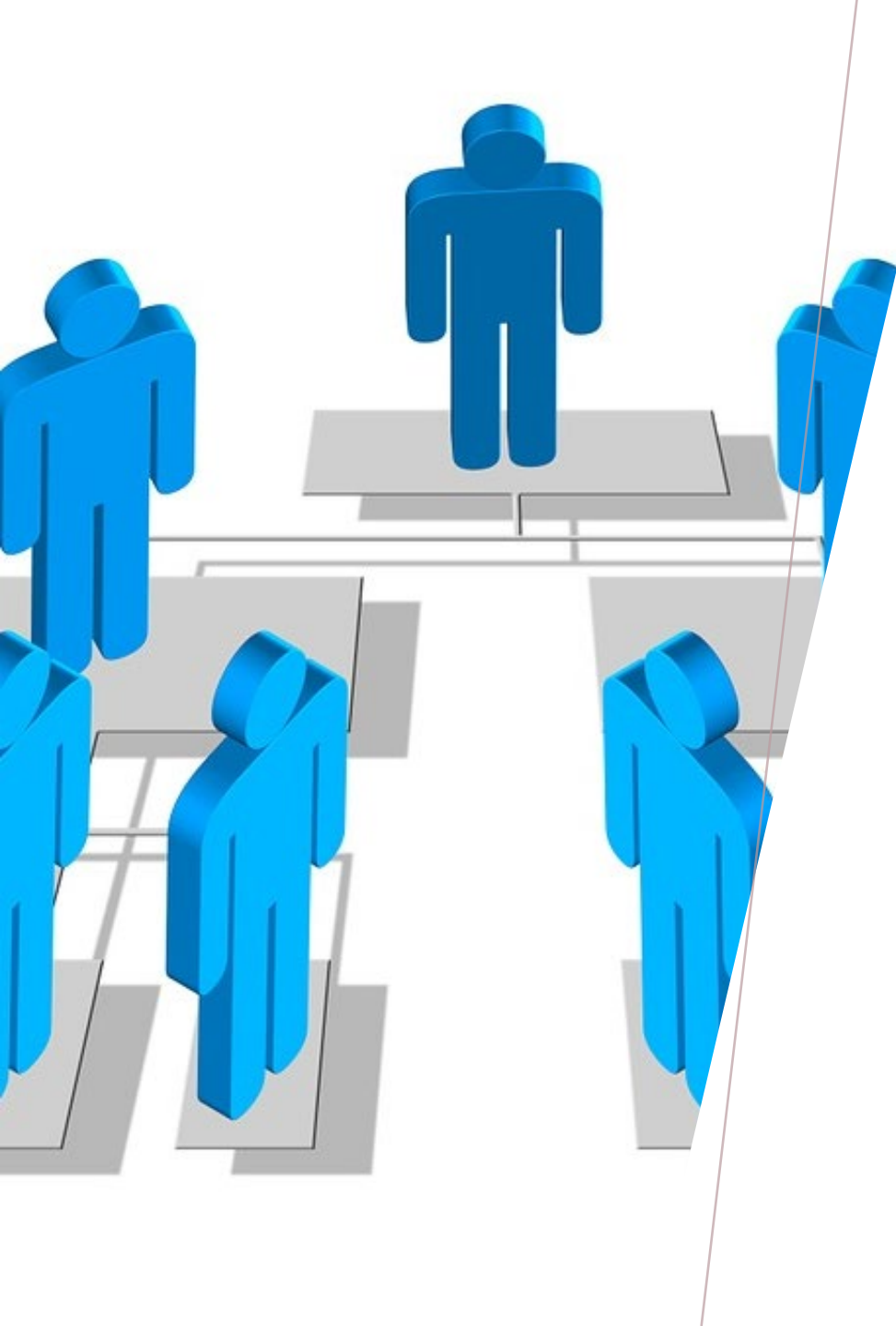


POSITIVE

*WHAT ARE THE MOST  
IMPORTANT THINGS YOU CAN  
DO TO RETAIN TALENT?*







# *RETENTION STARTS AT THE TOP*

- From the City Manager or Mayor (including Council)
- Through all Leadership and Staff Positions
- To the lowest level of supervisor
- Is everyone on the same page – positive, pleasant, supportive, servant leadership, show that you care, show concern, SWAT – stop, walk, and talk – engage?
- Find out what “their” stories are
- Make the workplace a fun place to work (as far as possible)



# *RETENTION REDEFINED*

- Redefine what retention is
- “Hire to Retire” versus
- 3 to 5 years (ROI – Career Expectations)
- Not all departures are bad!

*ON BOARDING  
THE BEGINNING OF A GREAT  
RELATIONSHIP*



## *WHEN TO ON BOARD...*

At hiring – the initial stage of retention

At assignment changes

At promotion



# *ONBOARDING*

Create an onboarding script

Set the tone and expectations...in a positive way





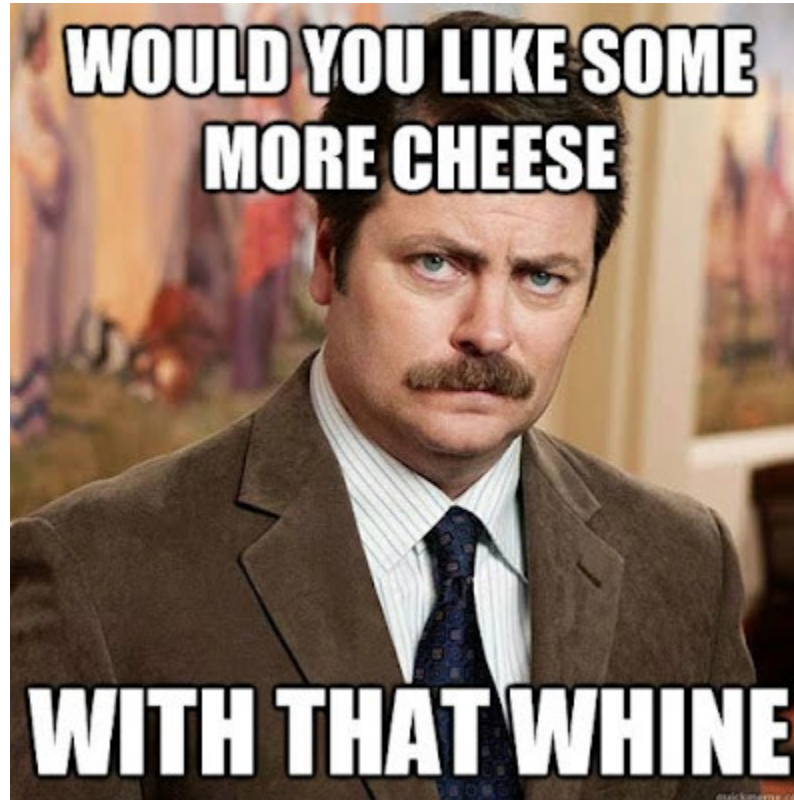
*REDUCE/ELIMINATE  
DRAMA/CHAOS*





# *DEALING WITH MALCONTENTS: THIS IS A RETENTION ISSUE!*

Malcontents –  
ROADies -- Slackers  
– Et al.– These folks  
do real damage to  
the organization –  
downstream –  
retention and  
recruitment



C2C: Courage to  
Confront – these  
folks thrive on our  
reluctance to  
confront their  
performance and  
behaviors.

Take 'em on....



Business Plan

# *TALENT DEVELOPMENT: SUCCESSION PLANNING*

Workforce planning

1 Recruiting

2 OnBoarding

3 Performance management

4 Training & performance support

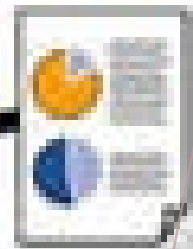
5 Succession planning

6 Compensation and benefits

7 Critical skills gap analysis

Learning Content

Job Roles  
Job Descriptions  
Competency Models





# *STRATEGIC HUMAN RESOURCE MANAGEMENT (SHRM)*

- What is your current staffing situation?
  - Tenure = retirement windows
- Gotta do the analysis – by department – age and years – clusters are bothersome and are cause for concern
- Evaluate current tenure (expected retirement dates)
- Assume that there are two dates an employee has for retirement
- The one they tell you and the one in their head (assume it is shorter than stated)



# *POTENTIAL IDENTIFIED (HOW)*

- Self identified
- Mentor/Coach identified
- Proactive
- Assessment



CAREER  
DEVELOPMENT  
CORPORATE  
PARTNER  
LEVEL  
MONEY  
SUCCESSFUL  
APPLY  
SEARCH  
EMPLOYMENT  
CLERK  
CRAFT  
BU  
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SPEC  
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UTIES  
PRISE  
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FESSIO  
RING

# *CAREER COUNSELING*

- Every person starting at employment should have a career counseling conducted at least yearly (recommend that it NOT be at performance appraisal)
- Ask them what it is they want to achieve in their career
- Then, create an MBO to achieve it
- Cycle into formal succession plans if assessments of potential indicate
- (See 9-Box Matrix and GAPS analysis – coming up)

# 9-BOX MATRIX (REPLACEMENT TABLES)

Create this matrix  
for each position

Put names in the box



High  
Moderate  
Low

<b>Rough Diamond</b> Low Performance/High Potential	<b>Future Star</b> Key is career counseling Assign a mentor/coach	<b>Consistent Star</b> Remember Rule of Stars Potential is high
Inconsistent Player Support – lead	Key Player Identified by supervisors and managers	Current Star Put a name to this person Look at motivation
Talent Risk Dark Star/Problem/Motivation	Solid Professional Identify this person for succession preparation	High Perf/Low Potential High Professional Known quantity
<b>LOW</b>	<b>Moderate</b>	<b>High</b>

Performance





# *SUCCESSION PLANNING: GAPS ANALYSIS*

Individual or  
organization

	Step 1: Goals Where do you want to go?	Step 2: Abilities What can you do now?
Goals	Career Objectives	What strategies do you have for your career objectives?
Abilities	Career Strategies	What development needs will you have to overcome?
Perceptions	Step 3: Standards What does your boss or the organization expect?	Step 4: Perceptions How do others see you?
Standards	Expectations Competencies (needed now, needed in the future)	360-Degree Appraisals (development) Boss/peers/direct reports/shareholders (customers)

# *JOB DESCRIPTIONS DEVELOPMENT*

- Create job descriptions that are up-to-date and relevant
- Audit periodically – SKAs – now and into the future
- Core Competencies
- Resources:
- Bureau of Labor Statistics:
- <https://www.bls.gov/oes/current/oes333051.htm>
- Onet Online:
- [See All Occupations](#)





## *HR'S ROLE*

- Aid city elected and appointed officials to work towards, achieve and maintain a positive, effective, efficient, and economical and sustainable organization
- That is aimed at achieving the stated goals and objectives of the organization
- Works to the benefit of the external stakeholders (citizens) and the internal stakeholders – your employees



*HUMAN RESOURCES  
IS OPTIMALLY  
LOCATED*

*YOU ARE THE EYES  
AND EARS OF THE  
ORGANIZATION  
TASKED WITH  
ENSURING CURRENT  
AND FUTURE TALENT  
NEEDS ARE MET AND  
CHANGE IS PLANNED  
FOR*





# *WRAP-UP AND TAKEAWAYS*

- How does it feel to work there?
- Succession Planning Starts at Hiring!
- If you can retain them, you do NOT have to replace them.
- Hire to Retire is NO LONGER A WORKABLE assumption or goal.
- ROI: 3 to 5 years is probably the optimum for most employees
- Pay GO/Pay to Stay
- Are your employees engaged? Does not mean they are “loyal”
- Motivation is intrinsic to the employee (we are all self-interested & self-motivated)
- Make it about: making a difference, doing good, and service to people
- Do the assessment and analysis to understand where the city is: talent wise
- Are the city’s leaders committed to positive, humanistic management methods
- On-boarding is critical to setting the proper expectations and employee satisfaction (remember, the absence of dissatisfaction is not MOTIVATION)
- Happy cows DO NOT make more milk, but they are happier cows
- Courage to Confront – malcontents do real harm to the city and departments
- Succession Planning is an active and ongoing process
- Analysis
- Review and Update job descriptions (sources provided)
- 9-Box Matrix Process
- Mentors and Coaches matter



# QUESTIONS





# *THANK YOU*

Dr. G. M. Cox (Chief, Retired)

(903) 875-4411

[gmc0x1100@yahoo.com](mailto:gmc0x1100@yahoo.com)

SHSU: [gmc037@shsu.edu](mailto:gmc037@shsu.edu)