

AFT Public Employees, AFL-CIO

Sandra Feldman, President

Edward J. McElroy, Secretary-Treasurer

Nat Lacour, Executive Vice President

The AFT Public Employees Recruitment and Retention Task Force:

Jill Bradfield, Professionals Guild of Ohio, OFT, AFT, AFL-CIO

Art Foeste, Wisconsin Professional Employees Council, WFT, AFT, AFL-CIO

Toni Joyce, Kentucky Association of State Employees, AFT, AFL-CIO

John Little, Illinois Federation of Public Employees, IFT, AFT, AFL-CIO

Colin O'Neill, Judicial Professional Employees, Connecticut, CFEPE, AFT, AFL-CIO

Jo Romero, Colorado Federation of Public Employees, AFT, AFL-CIO

Dave Rudebock, Professionals Guild of Ohio, AFT, AFL-CIO

Chris Runge, North Dakota Public Employees Association, AFT, AFL-CIO

David Stallone, New York State Public Employees Federation, AFT, AFL-CIO

Betty Vines, Kansas Association of Public Employees, AFT, AFL-CIO

Bill Walling, Maryland Professional Employees Council, AFT, AFL-CIO

AFT Public Employees Staff:

Steve Porter, Director

Jennifer Shaw, Senior Associate

Karen Schiffhauer, Administrative Secretary

Jewell Gould, Research Director

Charlie Glendinning, Director of Art

Mary Boyd, Copy Editor

<http://www.aft.org>

Special assistance from Lorel Wisniewski, Workplace Economics

Cover art by Todd Dawes

Executive Summary

Quality government services face attack from many fronts. Tax giveaways, raids on public reserves and a major drop in the economy have all combined to drain vital resources away from government programs. This, in addition to widespread early retirement incentives and a massive wave of Baby Boom retirements, will take the most skilled and expert employees out of public service. Public service no longer is viewed as an employer of choice; we are seeing unprecedented voluntary separations in many states as well. There are many job opportunities for knowledge workers. The public sector needs to compete with the private sector to maintain quality services. What has been referred to as a “quiet crisis” is getting louder by the moment. Public employee unions, government administrators and those setting the course for government policy must act now to address the clear threat facing quality public services.

Forty-five percent of all government employees are considered Baby Boomers (born 1946 – 1964), eligible to retire in the next five to 10 years. Baby-boomer retirements and turnover will be exacerbated by early retirement programs and cutbacks forced by state legislatures, county councils, Congress and policy makers. Turnover at every level of government is increasing. Although the work force has continued to grow in absolute terms, it has been growing at a declining rate since about 1980. There are 3.4 million *fewer* workers in Generation X and Generation Y. There will be more vacancies and fewer eligible workers.

The appeal to new workers has to be more sophisticated and focused given the different goals and attitudes of workers now entering the workforce. Establishing a more effective government recruitment and retention program represents a dramatic shift in operating procedure for most public employers since, historically, little has been done to advertise and promote jobs in government service. Leaders in government and in our union can help to change operating procedures and help promote the jobs that build our communities and strengthen our nation.

Finding creative ways to attract and retain employees to public service requires that unions learn what different people desire in their working lives. It is important to understand demographics and the key generational differences in work style, so that in designing an effective recruitment and retention plan, unions target all generations.

Strategies to deal with the recruitment and retention problem must include an analysis of compensation and benefits available to public employees along with an analysis of how these salaries compare with alternative employment opportunities. Through professional polling of our members across the country, we know that, in addition to increasing salaries, AFT

public employees feel that their employers need to offer professional/career development opportunities and more flexible work schedules to effectively address this problem.

Since there is no one-size-fits-all strategy to attract and retain employees, unions must work to insure that employees are offered choices in a variety of strategies, including career development, remuneration, job flexibility, lifestyle, high roller and body and mind. Within each of these strategies are tools that are attractive to the different generational cohorts.

In order to address the threat facing government services, the task force makes the following recommendations:

1. **Public employee unions at all levels must be active in pursuing a complete work force assessment.** While this is often the obligation of an enlightened employer, public employee unions can have their own approach to workforce planning. Any program like this works best with the involvement of public employees and all stakeholders from the start of the process through implementation and analysis.
2. **Collect work force data on an ongoing basis to help government establish and maintain a comprehensive workforce plan.**
3. **The union and management should work together to monitor and survey employee satisfaction levels.** Through a variety of tools, employee attitudes and recommendations must be taken into consideration in the design and flow of work. Involving employees in workplace decision making and in the mission of the agency can yield greater employee satisfaction that translates into better service to the public. If the employer refuses to get involved with surveying employees, the union can act to fill the void.
4. **Public employee unions, government administrators and policy makers must work together to develop a strategy to address work force needs.** Current testing, hiring, promotion and transfer policies need to be analyzed to determine whether these practices meet the work-life expectations of current employees and appeal to the different generations of potential employees.
5. **Steps must be taken to establish a learning, challenging environment that allows government employees to be innovative, productive, independent knowledge workers.** By moving in this direction, employees will have a greater connection to the mission of the agency, more job satisfaction and a better opportunity to improve services to the public.
6. **Individuals entering the work force have little exposure to the benefits of public employment because there is little being done to**

recruit and educate potential employees about the value of government work. Public employees have indicated a strong willingness to help with recruitment efforts, but these efforts need to be much more aggressive and pervasive. Low-tech job fairs and high-tech web sites and many forums in between offer opportunities for public employers to inform potential employees about the exciting and important work being done by government agencies across the board.

7. **Effective recruitment and retention programs require a cooperative labor-management partnership.** This partnership is best established through the collective bargaining process, where the parties come to the table as equals. A meaningful labor-management partnership that gives employees—who know the job best—greater say and more control over their work benefits all parties: employees, government administrators, policy makers and the public at large.

8. **Real action on recruitment and retention issues requires real leadership.** Government and union leaders must be advocates for educating people about the problems facing government service and call for action to address these problems. To address these problems effectively, our leaders must make public sector recruitment and retention a priority. Only through real leadership can we hope to gain the resources necessary to implement a meaningful plan of action to improve the government workplace and services to the public.

Foreward

Art Foeste, a tax auditor with the Wisconsin Department of Revenue, remembers representing his department at a college job fair. “Hundreds of students walked right by my booth when they found out that I could not offer the salary they found necessary to pay their student loans, and I was not able to make them an offer for many months.”

For Foeste, this was an eye-opening experience that, as a local union president, set off all sorts of alarms. Whom would the union turn to for leadership in the next 10 or 15 years? How would the state of Wisconsin maintain the high quality of services its citizens had come to expect if, as an employer, the state was unable to attract the best and the brightest and, instead, had to settle for the desperate?

The AFT Public Employees program and policy council authorized the Recruitment and Retention Task Force in the summer of 2000 in response to Foeste’s concerns and those of many local leaders. Public employees were separating from service in large numbers, often through retirement or to pursue better jobs, and it seemed that there was little employer interest in adapting public service in ways necessary to attract new candidates to our work. The recruitment and retention crisis facing government service is not unique to our division of the AFT. Both the K-12 teachers and the health professionals represented by the AFT also face a shortage of qualified candidates and are continuously evaluating new tools to attract people to healthcare or teaching.

With the June 2001 release of the interim report, *The Quiet Crisis: Recruitment and Retention in the Public Sector* the issues identified helped provide broad definitions of the tools needed to recruit and retain employees. As the task force continued its work in 2001-2002, we became committed to providing a forum for both labor and management to discuss recruitment and retention issues around the same table. In December 2001, most of the task force members invited their management counterparts to participate in such discussions. This experience proved to be the most interesting of our two year program. Special thanks to our management counterparts: Eric Fenner (Franklin County, Ohio), Steve Serra (state of Maryland), Paula Stoll (state of Montana), Ken Purdy (state of North Dakota) and Michael Sandal (North Dakota University System), Michael Soehner (state of Wisconsin) and Bobbi Mariani (state of Kansas). Dave Lewis, a state legislator from Montana, added invaluable insights to our discussions, and we thank him for making the trip from Montana to our nation’s capital to participate.

At our final meeting in March, Dr. Linda Duxbury from Carleton University

in Ottawa, Ontario, Canada, helped us develop an overview of our report.

Over the last two years, the task force members relied on a number of people who provided invaluable information and experience. They include:

Marcy Magid and Elliott Susseles from The Segal Company provided information on cafeteria benefits.

Lorel Wisniewski from Workplace Economics discussed the reality of state employee benefits.

Jewell Gould, AFT Research Department Director

Ed Muir, AFT Research Department

John Abraham, AFT Research Department

Steve Serra, Recruitment and Examination Division, State of Maryland

Jonathan Walters, author and journalist for *Governing* magazine

Lora Lovosky and Linda Anselmini from Organizational Navigators

Guy Molyneux, Hart Research

David Strom, AFT Legal Department

The experience around the table at each and every task force meeting also provided for exceptional interchanges among participants. Thanks to Dennis Ziemer, who highlighted the flex time schedules in the federal government, Todd Lovshin, for his discussion with Paula Stoll and Dave Lewis of the alternate pay plans in Montana and Gary Pagels, Mike Soehner and Art Foeste for their discussion of the Wisconsin broadband system. Special thanks to Lorel Wisniewski for her valuable assistance and expertise. Lorel's background and knowledge of workplace issues was an essential resource to the work of this task force and added tremendous value to the report.

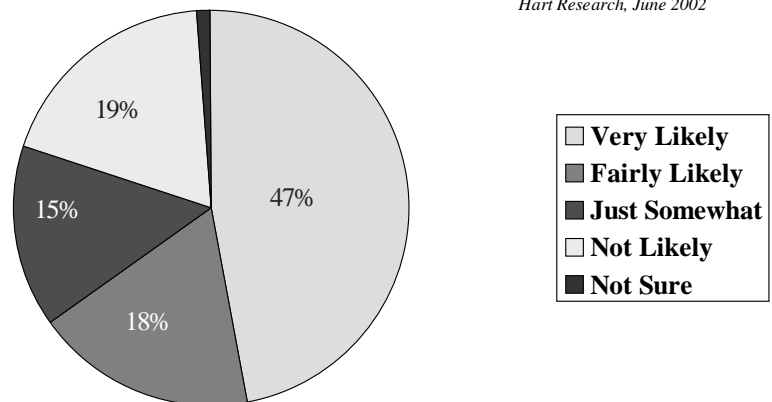
Hundreds of news articles, research papers, polling data and government documents were reviewed in preparation for this report. To a person, each participant had a personal experience that demonstrated the employer's inability to attract candidates for particular jobs. The recruitment and retention crisis facing government service is not going away. It is a union issue that AFT Public Employee locals must begin to address. We hope that this report is useful in examining the many options that are available to make public service a job of choice.

Introduction

A crisis looms over the future of government services. Forty-five percent of all government employees are considered Baby Boomers (born 1946 - 1964) who will be eligible to retire in the next five to 10 years. Magnifying the impact of these Baby-boomer retirements and turnover are early retirement programs and legislative cutbacks resulting from a slow down in the current economy. Turnover at every level of government is increasing. When one couples these facts with the hard reality of demographics, the picture grows even bleaker. There are 3.4 million *fewer* workers in Generation X and Generation Y. There will be more vacancies

If your employer were to offer an early-retirement option that was financially attractive, how likely would you be to retire?

*AFT Public Employees Survey
Hart Research, June 2002*



Baby boomers constitute such a large percentage of government employment that, when they leave, public service will face a disproportionate share of the recruitment burden facing the general economy.

and fewer eligible workers. Government will be losing its most experienced workers while facing fewer potential replacements who view government service as a desirable employer of choice.

Baby Boomers constitute such a large percentage of government employment that, when they leave, public service will face a disproportionate share of the recruitment burden facing the general economy. Public safety, job growth, care for those less able, protections for our air, water and environment, scientific advancement, medical assistance and thousands of other services that nourish and enrich our society will be handicapped by the recruitment and retention problem facing government service in our nation. Services that build and strengthen our communities will not be available at existing levels without hiring talented and knowledgeable employees who can and wish to fill the mounting

vacancies throughout government service. Clearly, we must take action on behalf of current and future public employees and on behalf of the public in general to help insure the continued delivery of quality public services.

Some 5 million employees work in state and local government across the United States. Half work under the protections and benefits of a collective bargaining agreement; far too many work in public service without these rights and protections. State laws on collective bargaining vary widely, and half the states in the country still do not provide meaningful collective bargaining rights to public employees. Public employee collective bargaining is further complicated by a patch-work quilt of state and local laws and executive orders that vary considerably. Other states without collective bargaining rights leave public employees to the vagaries of civil service merit protections, and still other states are throwing out merit system protections altogether in favor of an at-will system of employment.

In those states where meaningful collective bargaining exists, public employees have a greater opportunity to address the problems facing their workplace. Employees are more likely to feel a connection to their work and to the mission of the government agency when they have the opportunity to be truly involved in the decisions affecting their work. This stronger connection between employees and their work reduces the potential for early retirements or separation to seek other employment.

Members of AFT public employee unions across the country and at all levels of government are feeling the impact of government's inability to recruit talented, well trained employees. Our members are working harder, doing more with less, as jobs go unfilled and as recruitment options dwindle. Members are leaving government employment for more lucrative positions elsewhere, and the average age of current employees is increasing dramatically. Building and maintaining quality government service is union work, and it can only be done with the involvement of a quality workforce. The best way to insure that involvement is through a meaningful collective bargaining process.

Recruitment and retention problems face the country as a whole and not just those states without public employee collective bargaining. Some jurisdictions are having greater success than others in addressing the problem. More and more states in the AFT Public Employees nationwide compensation survey are indicating that they have a "performance-based" compensation system. Other states are learning that they need to reform their pay plans by changing the classification system, or "broadbanding" their classification system. Some jurisdictions have developed so-called "pay-for-performance" schemes to try to address the compensation problem. These compensation trends have had an impact in some places; in others they have been abandoned for lack of results, poor planning or any real commitment by the employer or the legislature. Real progress on compensation reforms can best be made where there is legitimate employee

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input and a realistic commitment of money and resources by the employer.

There is no simple answer, no silver bullet, to the recruitment and retention problem. We must work within the reality of our time. Some public jurisdictions recognize the impending recruitment and retention crisis in government service but are trapped by the realities of public service and the political landscape. Some jurisdictions have tried innovative compensation systems, however, the various systems are not funded to insure their success. Budget cuts, layoffs and soaring healthcare costs are challenging to all public service employers. While the human resource department tries desperately to encourage older workers to continue their employment, the city council or the legislature offers an early retirement incentive that pushes employees out the door.

Fifty percent of government jobs are in occupations that can be categorized as knowledge workers, those requiring specialized training, education or job skills.

The public sector is adversely affected by the impending loss of knowledge workers. Knowledge workers can be defined as anyone who works for a living using knowledge and information. For example, a knowledge worker might be someone who works at any of the tasks of planning, acquiring, searching, analyzing, organizing, storing, programming, distributing, marketing, or otherwise contributing to the transformation and use of information and those who work at using the knowledge so produced. Fifty percent of government jobs are in occupations that can be categorized as knowledge workers, those requiring specialized training, education or job skills. 29 percent of all private sector jobs are categorized this way.

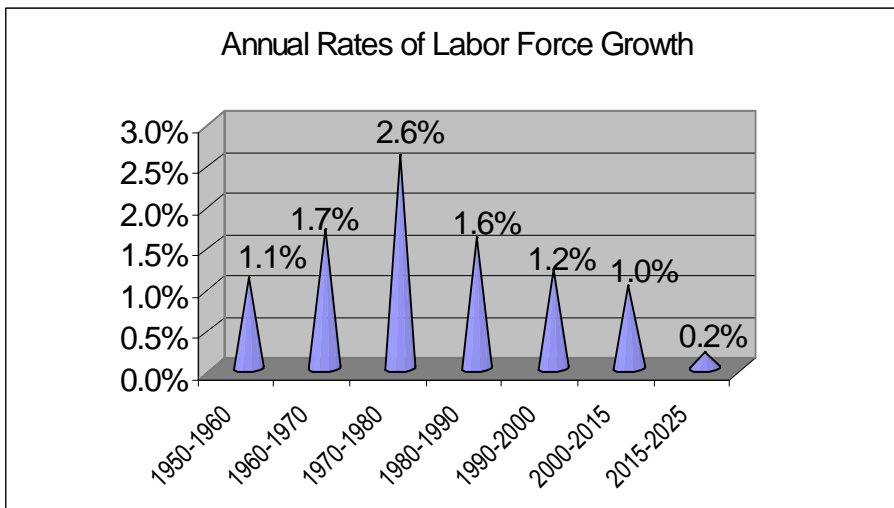
This final report offers unions demographic data on the impending crisis as well as a variety of tools to address the needs of each generation of workers. We have reviewed hundreds of ideas and concluded that these tools *could* work in many different circumstances to help make government service more attractive to new recruits and the current work force. Our union, like the government work force that we represent, is extremely diverse. We encourage local leaders to review our recommendations and suggestions and use those ideas that best fit local circumstances. Innovative, original ideas to address local situations may be the best fit of all.

Demographics

Public employment has moved from a sellers' market to a buyers' market due to the decrease in available workers and competition from other hiring sectors. Thirty years ago, government employment was far different – for every posted job vacancy, as many as 50 unsolicited applications were received. People were content to wait for six to eight months to hear about their application. Public employers' greatest hiring task was taking the time to review all of the resumes and conduct interviews. This is no longer the case. Today positions remain vacant for months with no qualified applicants or only minimally qualified applicants.

It is no secret that the aging of the Baby Boom generation has had, and will continue to have, a tremendous impact on the economy. Baby Boomers—the 76 million born between 1946 and 1964—have largely determined the demographic profile of our nation's work force for the past 30 years and will continue to do so at least until 2025. Early Baby Boomers began entering the labor force in the 1960s, followed by most of their generational cohorts during the following decade. Although the work force has continued to grow in absolute terms, it has been growing at a declining rate

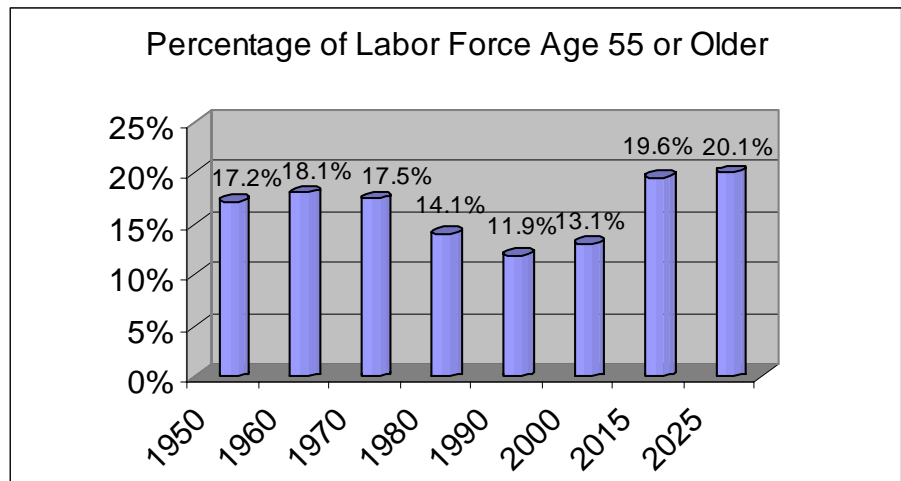
Baby Boomers—the 76 million born between 1946 and 1964—have largely determined the demographic profile of our nation's work force for the past 30 years and will continue to do so at least until 2025.



Source: U.S. Bureau of Labor Statistics

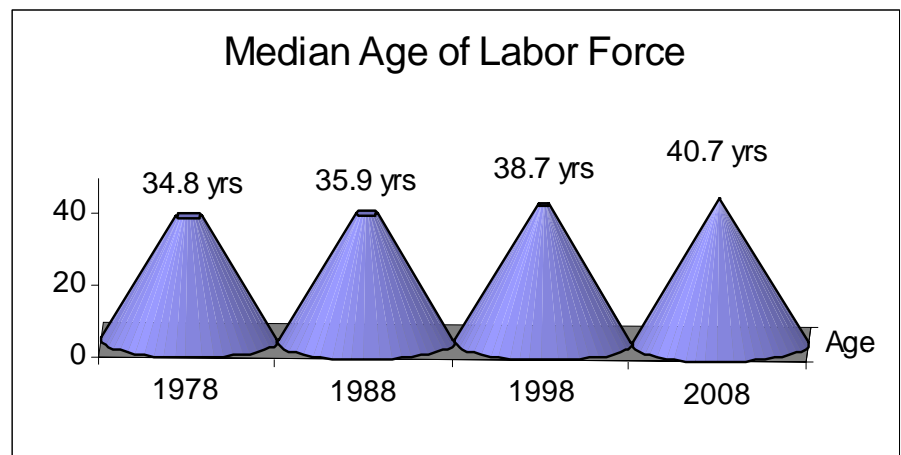
since about 1980, as shown in the chart, below. The growth rate is expected to decline even more sharply from 2015 to 2025 as the Baby Boom generation retires.

As the growth rate of the labor force declines, the labor force overall will experience a rise in average age due to the overwhelming influence of the Baby Boom. The proportion of the labor force that is 55 years of age or more fell when the Baby Boomers first entered the work force in the 1960s and rose around 1990 as this generation reached middle age.



Source: U.S. Bureau of Labor Statistics

As Baby Boomers progressed through their careers, followed by fewer workers available to succeed them in later generations, the median age of the labor force rose from 34.8 years in 1978 to 38.7 years in 1998. By 2008, the median age of the labor force is projected to be 40.7 years.



Source: U.S. Bureau of Labor Statistics

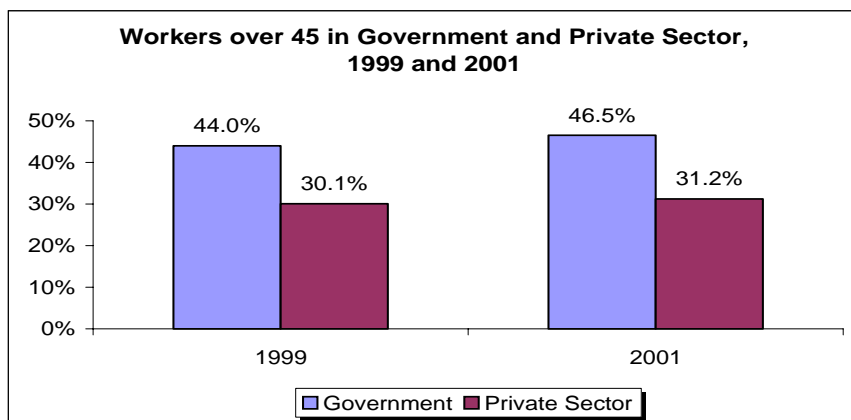
What is less well known is that the impact of the aging of the Baby Boom on employment and the work force will be disproportionately experienced by the public sector.

What is less well known is that the impact of the aging of the Baby Boom on employment and the work force will be disproportionately experienced by the public sector. In an article entitled “Gauging the Labor Force Effects of Retiring Baby Boomers,” (*Monthly Labor Review*, July 2000), economist Arlene Dohm of the U.S. Bureau of Labor Statistics identified occupations throughout the work force with a greater than average number of workers over the age of 45. Many of these identified occupations fell in the public sector at all levels of government. In this category were construction inspectors, public sector managers and administrators, education and related administrators, librarians and library clerks, bus drivers, teachers at all levels, counselors, psychologists, inspectors and compliance officers, welfare service aides, social welfare eligibility clerks, personnel clerks, civil engineers, nurses, practical nurses, operations and research analysts and social workers. In each case, more than 30 percent

of the occupation's incumbents were over the age of 45.

In the *Quiet Crisis*, the AFT Public Employee Recruitment and Retention Task Force documented this phenomenon with evidence supplied in a 1999 study by Samuel M. Ehrenhalt of the Nelson A. Rockefeller Institute of Government prepared for the Center for the Study of the States. Don Boyd, also of the Rockefeller Institute, has updated the original study using data from 2001. We were surprised to see the magnitude of demographic changes that have occurred in that brief two-year period. The graphs and information that follow are based on both the 1999 and the more recent 2001 studies provided to us for this report by the Rockefeller Institute.

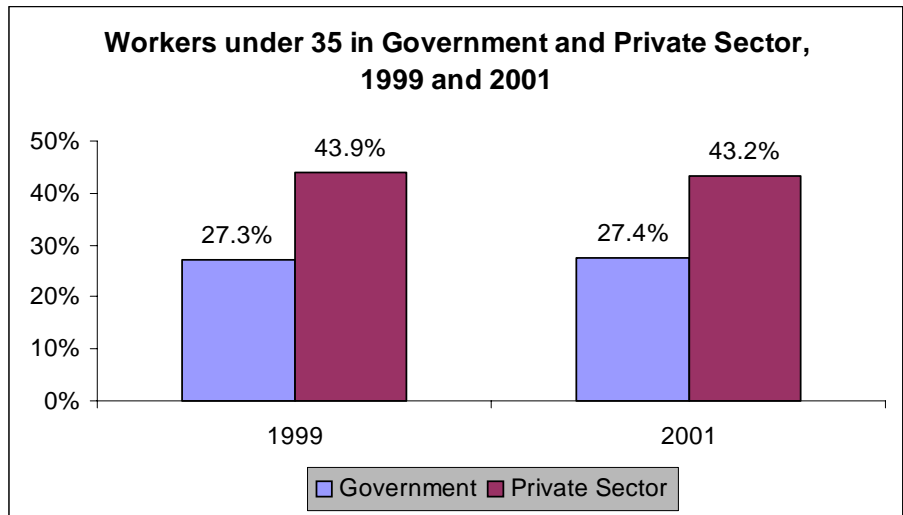
According to the Rockefeller Institute, 46.5 percent of government employees were over the age of 45 in 2001, up 2.5 percentage points since 1999. By comparison, 31.2 percent of private sector employees were 45 or older in 2001—still a large percentage, but significantly less than in government. In the private sector, the percentage of workers over age 45 rose by 1.1 percentage points from 1999 to 2001.



Source: The Nelson A. Rockefeller Institute of Government

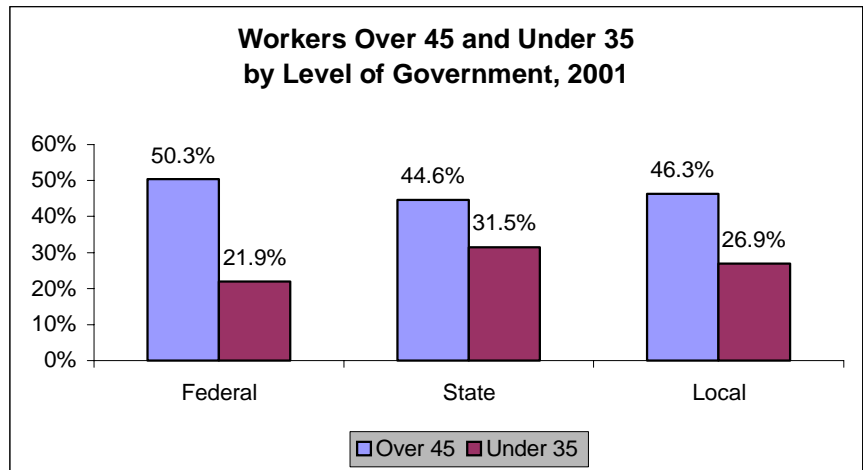
In contrast—and compounding the problem—younger workers under the age of 35 were more likely to be found in the private sector, with 43.2 percent employed in the private sector and just 27.4 percent in government in 2001. The percentage of workers under 35 fell less than 1 percent in the private sector but actually rose by just one-tenth of 1 percent in government as compared to 1999. This slight rise in the proportion of workers under 35 combined with the larger increase in workers over 45 also suggests that the proportion of mid-career workers between the ages of 35 and 45 fell during this same two year period from 28.7 percent to 26.1 percent. The percentage of mid-career private sector employees also fell from 26.7 percent to 24.9 percent of all private sector workers.

A predominance of older workers is found at every level of government.



Source: The Nelson A. Rockefeller Institute of Government

A predominance of older workers is found at every level of government. The federal government employs the largest proportion of older workers



Source: The Nelson A. Rockefeller Institute of Government

over the age of 45, while state governments employ the largest percentage of workers under 35.

Finally, the predominance of older workers in government as compared to the private sector holds in every region of the United States. Older workers constitute a significantly larger portion of the government work force than in the private sector for each of the nine Census regions.

The table below shows the percentage of employees over 45, by Census region, for both the government and private sectors.

Workers over 45 by Census Region, 2001

Region	Government	Private Sector
New England	50.2%	33.5%
Mid-Atlantic	48.0%	33.2%
East North Central	45.6%	32.5%
West North Central	45.8%	31.7%
South Atlantic	47.2%	31.9%
East South Central	47.1%	31.7%
West South Central	45.6%	28.7%
Mountain	46.0%	29.1%
Pacific	44.8%	28.6%

Source: The Nelson A. Rockefeller Institute of Government

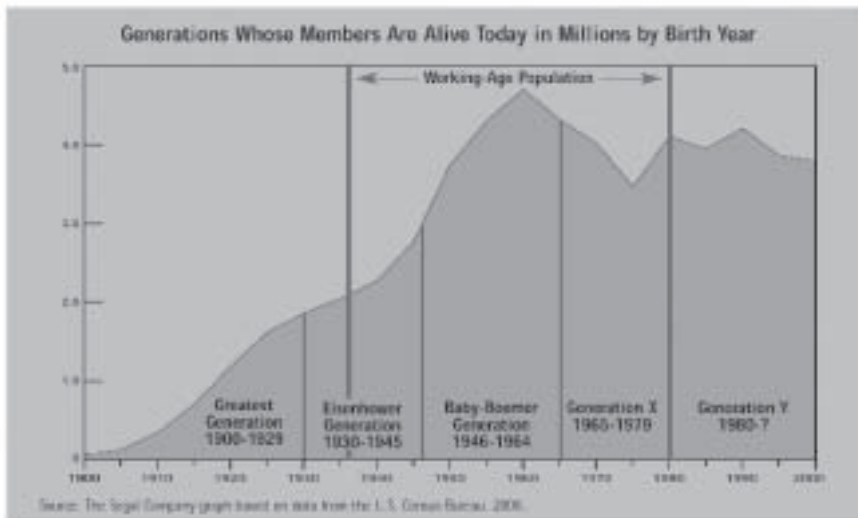
New England: ME, VT, NH, MA, CT, RI
 Mid Atlantic: NY, NJ, PA
 East North Central: OH, MI, IN, IL, WI
 West North Central: ND, MN, SC, NE, KS, MO, IA, MN
 South Atlantic: WV, VA, DE, MD, DC, NC, SC, GA, FL
 East South Central: KY, TN, MS, AL
 West South Central: OK, AR, LA, TX
 Mountain: MT, WY, ID, NV, UT, CO, AZ, NM
 Pacific: AK, HA, CA, OR, WA

The crisis is quiet but clearly profound. With the impending exit from the work force of our most experienced personnel and a shortage of younger workers to succeed them, unions and public sector managers must work together to confront recruitment and retention issues that promise to challenge the public sector for years to come.

Four Generations of Workers

If we are to confront our future recruitment and retention challenges, it is necessary to understand the generational cohorts and the attitudes of those we seek to attract to public service. For the first time in U.S. history, four different generations of employees are working side by side:

- Traditionalists (WWII or GI generation) – born 1945 or earlier
- Baby Boom -1946-1964
- Generation X -1965-1979
- Generation Y (Nexus or Echo boomers) –born 1980 or later



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Finding creative ways to attract and retain employees in public service requires that unions learn what different people desire in their working lives. It is important to understand demographics and the key generational

differences in work style so that in designing an effective recruitment and retention plan, unions target all generations. This is not a simple undertaking; however, our task force benefited from the work of many experts who have conducted research in this area. Following the work of the Segal Company, Dr. Linda Duxbury of Carleton University and others, we have defined generalized characteristic values common to each generational group: Traditionalists, Baby Boom, Generation X and Generation Y.

Traditionalists

CORE VALUES

Cautious
Self-sacrifice and deferral of rewards
Build and save for a better future
Black and white world view
Traditional
Deferent to authority
Team work

WORK VALUES

Loyalty
Dependability
Persistence
Hard working
Wisdom and experience over technical knowledge
Authoritarian

Baby Boom

CORE VALUES

Optimism
Entitlement
Self-fulfillment
Non-conformist
Experimental
Objective sense of right and wrong

WORK VALUES

Acceptance of stress
Team oriented
Workaholic
Importance of title/status symbols
Demanding of respect and sacrifice from subordinates

Generation X

CORE VALUES

Comfort with technology
Adaptable to change
Non-traditionalism

Acceptance of diversity
Confidence and self-reliant
Immediate gratification

WORK VALUES

Working within the system
Sacrifice personal life for advancement
Dependent on close supervision
Dedicated to goal achievement
Desire for job security
Insecure
Desire to be recognized

Generation Y

COREVALUES

Comfort with new technology
Adaptable to change
Subjective view of reality
Optimism
Diversity
Globally connected
Networking

WORK VALUES

Independence and autonomy
Challenge seeking
Variety seeking
Distrust of hierarchy and authority
Continuous development of skills
Lack of loyalty/unwillingness to commit
Work-life balance
Fun and communal workplace

It is clear that each generation has faced a different set of circumstances both in their upbringing and in their working world. Traditionalists often view work from the scope of seniority – if you wait in line, it will be your turn someday and you will get a promotion, an office, a chance to travel, whatever the case may be. Baby Boomers have the understanding that stress is necessary in their lives, that teamwork gets things done and the more work that you do, the better off you will be in your work life. They feel that “they made it and they’ve earned respect from their subordinates”. Generation X seeks job security and close supervision to achieve goals. They seek recognition from their supervisor. They are less likely to ignore the work and life balance. Generation Y is independent and doesn’t believe in seniority or job security.

In order to attract and retain *younger* workers, Dr. Linda Duxbury suggests that public service must:

- Vary assignments
- Teach new skills and provide ongoing career development
- Coach and mentor
- Keep them “in the loop” with information
- Provide instant feedback
- Reduce hierarchy
- Tie praise for a job well done to a concrete reward

Younger employees are looking for an employer who can provide life long learning and career development to prepare them for the future.

Younger employees are looking for an employer who can provide life long learning and career development to prepare them for the future. They want more than just a salary; they want a lifestyle that focuses on work-life balance and a healthy workplace. Two-thirds of Generation X and Generation Y employees witnessed layoffs and the effects of downsizing in their family firsthand in the 1980s and are unwilling to dedicate themselves to an employer who doesn't respect the work-life balance.

In order to attract and retain older workers, the public sector needs to analyze human resource policies to insure that they do not discourage recruitment of older workers or encourage older workers to leave. Examples of these policies are pushing early retirement, providing benefits only to full-time employees and offering no flexibility in benefits or hours of work. Dr. Duxbury offers a number of suggestions to attract older workers:

- Develop flexible work options, such as part-time positions, job sharing, reduced hours with reduced pay, flextime and phased retirement
- Invest in training, retraining, career development and reward systems suitable for workers of all ages
- Redesign work space with brighter lighting and ergonomic workstations
- Offer flexible benefits
- Implement eldercare and home care assistance programs
- Provide retirement education

(Source: Dr. Linda Duxbury Presentation to Task Force March 12, 2002)

There are three notable differences between the Baby Boomers and the Gen Xers. *Gen Xers are marrying earlier and having children earlier than the Boomers did.* For this generation, reasonable family health insurance and child care programs may be more attractive to younger employees than they were in the generation before them. *Younger workers (Gen X and Gen Y) are starting earlier to save for retirement,* which may indicate that pension planning classes and a strong pension are more attractive to these employees than once thought. Lastly, *Generation X and Y employees are more racially diverse than the Baby Boomers.* Younger workers seek a work environment that reflects their reality and must mirror their diverse upbringing. (The Segal Company, “The Aging of Aquarius: The Baby Boom Generation Matures”)

In order for the public sector to become an employer of choice, it must recognize the different needs of the generations and appeal to all of the workers, striking a generational balance that eliminates the potential for conflict.

Employees of all ages have particular expectations from the workplace. In order for the public sector to become an employer of choice, it must recognize the different needs of the generations and appeal to all of the workers, striking a generational balance that eliminates the potential for conflict.

The Total Compensation Package

The desire for fair and equitable compensation is an employment goal common to all generations. Compensation is the most crucial link between an employee and the workplace, and most organizations realize that the primary goal of compensation is to recruit and retain employees. Because compensation is frequently the determining factor in an individual's decision to accept a new job or leave one's current employment, the impact of compensation on recruitment and retention cannot be understated.

Benefits are the second part of the total compensation package that employees consider when making decisions about employment. While most public employees or prospective public employees expect to receive such benefits as health and life insurance, a pension plan, vacation and sick leave, the particular mix of benefits desired may vary by generation. Soaring health care costs have made health insurance a valued benefit for all employees, but medical, dental, vision care and similar benefits will be most prized by those with the greatest need: employees with families or those who experience health problems as they age. Generation X and Generation Y are just beginning to save, but pensions are just too far in the distant future to take priority when compared with more immediate concerns like repaying educational loans, getting that second degree and finding new challenges.

A thoughtfully designed benefit program can simultaneously serve very different sets of needs. Dependent care is primarily associated with young families with small or school-aged children but can also assist Baby Boomers faced with caring for aging parents. Flexible work schedules, telecommuting and other novel work arrangements appeal to busy families, to older employees contemplating a gradual shift toward retirement living, and to individuals of any age seeking a healthy balance between work life and personal pursuits. Many of these benefits can be provided at very low or even no cost to the employer. Often, what is most needed to get started is creativity, flexibility and commitment.

Public employees have generally enjoyed relatively attractive benefits packages when compared to their private sector counterparts, although benefits vary considerably among jurisdictions and for different groups of employees within jurisdictions as well. Fifty-eight percent of non-federal employees believed federal health and retirement benefits were superior to those found in private business, according to the Hart and Teeter study, *The Federal Brain Drain*, and 39 percent of respondents saw benefits as the primary advantage of working for the federal government. (Job security was cited as the second advantage.) Through collective bargaining, AFT Public Employee leaders and public jurisdictions can ensure this advantage of public employment does not erode and remains a vital tool for effective recruitment and retention.

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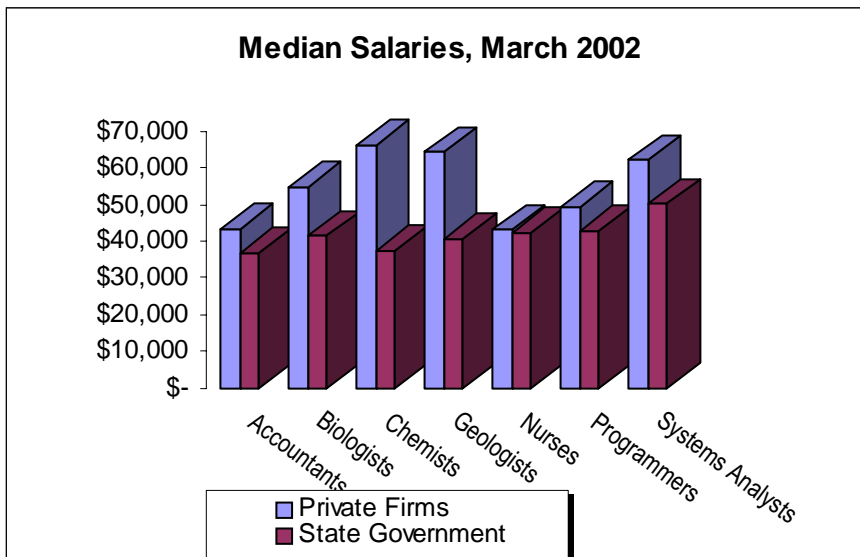
Compensation

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In the 2002 AFT Public Employee Hart Survey, 93 percent of AFT Public Employees stated that increasing salaries would be somewhat effective or very effective in improving recruitment and retention in their departments. Most significantly, it is not just the level of pay that matters, but relative pay, meaning the relation between any employee's pay and the pay of similarly situated workers in the outside labor market or elsewhere within the same employer. An employee may be reasonably content with his paycheck—until he finds out that his neighbor earns \$75/week more at a private firm down the street. In their study, *The Federal Brain Drain*, Peter Hart and Robert Teeter reported that 78 percent of non-federal employees and 70 percent of senior federal employees believed that offering competitive salaries would be very effective in recruiting new employees to the federal government. New labor market entrants will not seek employment in the public sector if starting salaries fall below what they can get from a private firm, especially if they are not ensured of the opportunities for advancement—in some cases, rapid advancement—that they associate with private employment. Other young workers may use jobs with state and local government to gain some initial experience, then accept more lucrative positions with private firms at the first opportunity.

Mid-career private sector workers seeking change cannot be expected to accept employment with a public jurisdiction unless that public employer can offer them a premium above the individual's current salary. While some individuals may be willing to forgo a boost in salary in exchange for improved benefits, work schedules or other quality of life working conditions, most would at least expect to retain their current level of compensation in making a job switch.

The *AFT Public Employee Compensation Survey 2002* compiled salary information from 46 states on a range of professional, technical and scientific jobs. While compensation practices vary considerably from state to state, and even from job to job within states, the study revealed several glaring salary deficiencies when state government salaries are compared to private sector salaries reported by the U.S. Bureau of Labor Statistics. The chart and table below compare median average salaries as of March 2002 for the private sector and state governments as reported in the AFT survey. The private sector pay data are estimated from the *National Compensation Survey 2000* published by the U.S. Bureau of Labor Statistics.



Median Annual Salaries, March 2002

Occupation	Private Firms	State Government
Accountants	\$ 43,417	\$ 36,816
Biologists	\$ 54,995	\$ 41,614
Chemists	\$ 66,281	\$ 37,360
Geologists	\$ 64,317	\$ 40,800
Nurses	\$ 43,056	\$ 42,325
Programmers	\$ 49,348	\$ 42,804

Source: *AFT Public Employees Compensation Survey 2002*

Fifty-six percent of responding AFT public employees indicated that low salary and low starting pay are the reason it is hard to recruit in the public sector (Hart Survey, 2002). This opinion is particularly profound in the Midwest, where 75 percent of AFT public employees cited low salaries and starting pay as the reason for recruitment problems, and also among AFT public employees in non collective bargaining states, where 73 percent shared this belief. The next most frequently cited reason for recruitment problems was lack of qualified applicants, cited by just 17 percent of AFT public employee survey respondents.

Not only must starting salaries be sufficiently attractive to recruit new employees, but salary progression and advancement opportunities throughout one's career must remain competitive with private sector alternatives in order to retain experienced workers. Employees who prefer to remain in the same job or job family also expect pay increases as they gain knowledge and experience in their chosen fields. When expected promotional opportunities or salary increases do not materialize, public employees will soon realize that their salaries have not kept pace with market pay, and the employer may experience retention difficulties.

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Prospective applicants as well as current employees may also be influenced by their perception of potential career opportunities. Hart and Teeter found that 78 percent of non-federal employees believed federal recruitment would be enhanced by offering more opportunities for career advancement. In the same study, 94 percent of senior federal employees cited improved career advancement opportunities as at least a “fairly effective” solution for recruitment, and 61 percent saw this as “very effective.”

The *AFT Public Employees Compensation Survey 2002* found that progression steps are the most common means of salary advancement within an occupation, with over half the states reporting the use of step plans for many of the occupations surveyed. Other states reported the use of merit systems, performance pay or open ranges. Under step plans, movement from step to step occurs at regular intervals based on seniority, although in some cases movement is contingent upon merit. Step systems have the advantage of ensuring equity in compensation among employees with the same level of experience in their current jobs. Despite inconsistencies in implementation that have occurred over the years, a tenet of civil service employment has been the equity of opportunity in hiring, placement, compensation, advancement and other aspects of employment. State governments should not sacrifice this comparative advantage. Step systems are also easy to administer.

Step systems in the states have suffered from two drawbacks over the years. First, in a number of cases, the length of the progression schedules is unusually long. The *AFT Public Employee Compensation Survey 2002* revealed progression schedules ranging from four or five years (California and Michigan, respectively) to as much as 23 years (Wisconsin, for Corrections Officers). Numerous states reported progression schedules lasting 10 years or longer (Alaska—19 years, Illinois—10 years, Kansas—11 years, Maryland—18 years, Massachusetts—12 years, Minnesota—11-13 years, Nebraska—15 years, Pennsylvania—20 years and Wisconsin—21-23 years). While relatively lengthy progression schedules can ensure employees regular salary advancement without requiring a change in position, the long wait to attain the maximum pay rate can pose a deterrent to performance and motivation. New employees, who may not fully understand the nature of the salary system until after starting their new jobs, may be particularly disheartened to learn that it may take them a decade or longer to achieve the maximum rate they saw advertised on the job announcement. *The impact is pronounced when maximum rates fall short of market salaries offered by competitive employers in either the private sector or other public jurisdictions.*

The good news is that unduly long progression schedules can be easily remedied by simply compressing the schedules, thereby reducing the length of time it takes an employee to reach the top of the schedule. Of course, such a solution is not without cost, as the state employer must pay out higher salaries more quickly than under the longer schedules. The costs,

however, can be minimized by introducing changes gradually; in any case they must be weighed against the savings derived from improvements in retention, recruitment, performance and motivation.

The second problem is not unique to progression step systems but applies to virtually all public sector compensation plans. Political realities frequently interfere with compensation administration as legislatures fail to fund scheduled step increases, merit awards, performance pay, COLAs or virtually any other aspect of compensation. Despite the best intentions of public sector managers, motivating even the best employees is difficult to achieve when well-deserved and, at times, previously promised, pay increases are not forthcoming.

AFT leaders, staff and members have a responsibility to work for adequate funding of the state compensation programs that benefit our members. In its 2001 report, *State Revenue and Taxation: Issues for Supporting Public Service in the 21st Century*, the AFT Public Employee Revenue and Taxation Task Force offered recommendations for the enhancement of now-depleted or endangered state coffers. The task force identified four criteria for the assessment of revenue enhancement options: the *adequacy* of revenue to meet state service needs, the *stability* of the tax and revenue system in the face of economic swings, the desire for *broad*-based taxes across the community and *progressivity* to ensure fairness and equity.

In recent years, a number of state and local governments have implemented changes in their existing compensation plans and policies to revitalize what are viewed as outdated systems and procedures. The new systems are designed to reduce bureaucracy, reward performance and enhance flexibility. Many of the new pay-for-performance and similar systems mirror compensation structures found in private firms, at least in part. Public jurisdictions are not private firms, however, and face administrative challenges and opportunities in compensation administration unique to the public sector. While alternative compensation systems should certainly be examined and considered as enhancements to compensation structures, the wholesale replacement of existing systems with pay-for-performance plans should be viewed with caution.

Alternative compensation plans must be assessed not only in terms of how well they have worked in the private sector or even in other public jurisdictions but, most importantly, they must be considered in light of the realities of public sector employment. Compensation professionals generally agree that compensation systems should support the overall strategy of the organization. The question to consider is how this can best be achieved in the public sector, where the overall mission is service to the community. While the concept of paying people for their performance is well understood and is consistent with the values of our culture and economic system, in practice, pay for performance can be very difficult to implement, even in private firms. Paying for performance requires that one can objectively quantify and document performance, an achievement that

Compensation professionals generally agree that compensation systems should support the overall strategy of the organization. The question to consider is how this can best be achieved in the public sector, where the overall mission is service to the community.

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remains elusive, at best. In the public sector, where employees spend their days counseling drug abusers, placing foster children, monitoring wildlife populations and inspecting groceries, restaurants and banks, performance defies quantification.

On the plus side, some alternative compensation systems may remove existing barriers to compensating high performers while encouraging dual career ladders and enhancing the flexibility of public employers in hiring new employees. Care must be taken, however, to ensure that existing employees are eligible for the same opportunities as new hires and that pay practices are implemented consistently and equitably across the state. If disparate practices arise and spread, the resulting inequities will only exacerbate the recruitment, retention and performance problems the new pay practices were designed to resolve.

Even if performance could be effectively measured in the public sector, the issue of adequate funding still remains. Six years after the Legislature passed a “cost-neutral” pay-for-performance system that is subject to available appropriations, Colorado is poised to award the first round of payouts in July 2002. With less than \$9 million left for all state employees after a 40 percent budget cut, the largest university system in the state has announced that it can only afford to award its peak performers a maximum salary increase of 1.1 percent. In North Carolina, which introduced a new performance-based pay system in 1993, the Legislature funded all three components of the program only once, and even then provided just 1.0 percent for performance bonuses.

The success of pay-for-performance programs lies in the consistent ability of employers to provide pay increases in exchange for performance (and to provide *significant* increases in exchange for exceptional performance). Employers that fail to provide increases consistent with their own compensation plans cannot expect to retain employees at any stage in their careers and should not be surprised when they experience difficulty in recruitment.

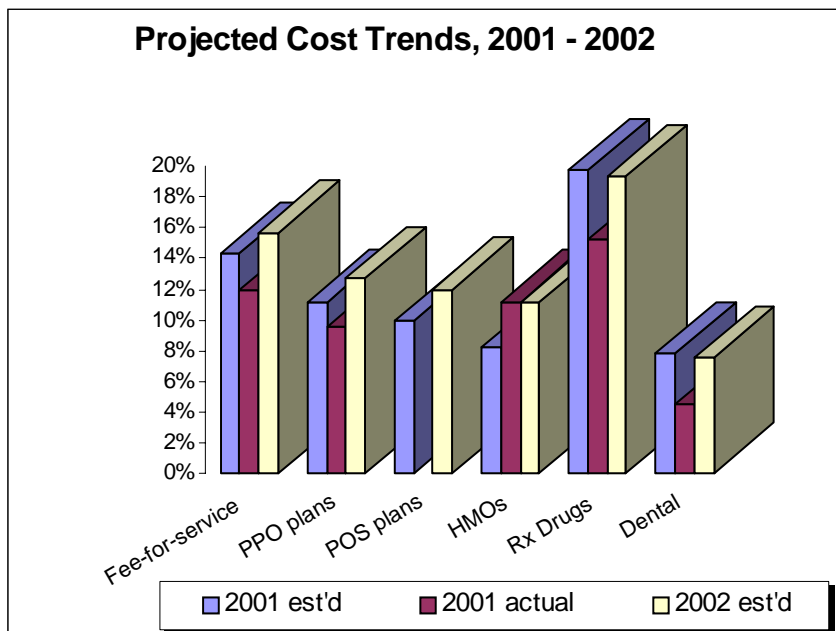
With collective bargaining, public employers and worker representatives can communicate their needs and concerns and jointly embark upon an exploration of the pay system that meets their mutual goals. The identification of criteria for the design and administration of compensation practices should be the first step in making changes to existing pay practices and procedures, and these should be spelled out in the collective bargaining agreement. No pay system can succeed unless employees believe it is being implemented with equity, and equity is both the means and the end in collective bargaining.

The Rising Cost of Health Care

Health care insurance is perhaps the fastest-growing component of benefits costs. Health care costs, which have been on the rise since the mid 1990s, have accelerated sharply in the last two years. As health insurance bites more deeply into take-home pay, employees will increasingly view an employer's ability to provide adequate protection from rising health care costs as a primary factor in making employment choices. Employers are well aware of the problem: a 2001 MetLife survey of 481 private employers revealed that employee retention (78 percent of respondents), controlling health care costs (73 percent) and attracting new employees (51 percent) were the three most important benefits objectives.

Employers in all sectors have responded to spiraling health care costs both by redesigning health plan options to encourage cost savings and by gradually shifting costs to employees. As this trend continues, individuals may increasingly find their decisions about employment and job changes are influenced by the health insurance plan offering and premium support offered by alternate employers. The Segal Company's 2002 *Health Plan Cost Trend Survey* estimates medical plan costs will escalate a projected 11.1 percent to 15.7 percent in 2002 for active employees and retirees under age 65, depending on type of plan. Segal further predicts that dental costs will rise about 7 percent, on average, and prescription drug benefits alone will increase nearly 20 percent.

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Note: Medical plan cost projections shown in chart exclude prescription drugs.
Source: 2002 Segal Health Plan Cost Trend Survey

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The shift in health care costs to employees has a direct impact on take-home pay, and the impact is growing as meager pay increases fail to keep up with rising health care costs paid by employees. In 2002, 17 states paid the full cost of the health care premium for individual coverage for at least one of the health plans offered, according to the *2002 State Employee Benefits Survey* by Workplace Economics, Inc., and six states paid the full premium for family coverage as well. Just 10 years earlier, in 1992, 24 states paid the full premium for the individual employee, and 8 states paid the family premium in full. Most significantly, the amount of the premium paid by the employee has grown dramatically, although in many states the state employer pays the larger share.

In the 33 states in which employees shared the cost of individual coverage with their state employers, the monthly premium paid by the employee as of January 1, 2002, varied from \$8.08 in Idaho to \$126.54 in Louisiana for the most popular plan, according to the *2002 State Employee Benefits Survey*. For family coverage, state employees paid anywhere from \$39.61 in Michigan to \$365.36 in North Carolina for the most popular plan. However, most states offer multiple-plan options with varying rates. In Colorado, for example, individual coverage may cost the employee anywhere from \$35.50 to \$160.44 per month, while family coverage costs the employee \$166.10 to \$501.76, depending on the health plan and coverage options selected. In Kentucky, employee costs range from \$0 to \$107.52 for individual coverage, and from \$0 to \$636.24 for family coverage.

The availability of a health plan option with a low or zero-cost to the employee may be of limited or declining value to many employees. The lowest-cost plans typically require higher deductibles and out-of-pocket costs, may feature less coverage than more expensive plans and may not be available to all employees depending on location. As employees age and their families grow, they may need to shift into more expensive health plans in order to provide adequate coverage.

Section 125 flexible spending accounts have been introduced in various forms by many employers to help employees shoulder rising medical and related costs. All 50 states now offer pre-tax dependent-care accounts, and 41 states offer pre-tax spending accounts for medical and related expenses. These plans allow employees to designate a portion of their salary to be placed in a pre-tax account and used to pay certain qualified unreimbursed costs, as defined by the IRS. Flexible spending accounts can be introduced and administered by employers at relatively low cost, and may, therefore, be a useful recruitment and retention tool. However, while enhancing the value of the employee's dollar that is directed into a pre-tax account, it is still the employee who is paying these costs.

The magnitude and skyrocketing growth of post-retirement health care costs can be expected to factor into the current employment decisions of

mid-career employees starting to think about their future work lives and retirement years. Rising health care costs have induced employers to reduce their share of retiree medical premiums, effectively shifting costs from employer to retirees and their families. Employers offering retiree medical coverage—or whose compensation and pension packages are sufficiently attractive to allow the employee to pay for expected future cost increases—will have the advantage in recruitment and retention.

Many public employees will experience sticker shock when they learn the price of post-retirement health care costs, especially in those cases where the retiree pays the full cost of coverage. Total monthly premiums are approaching, and in some cases exceeding, \$1,000 per month for family coverage—and this is *before* accounting for the impending price escalation estimated in the *2002 Segal Health Plan Cost Trend Survey*. The Segal report projects a 10.5 percent increase in costs of retiree fee-for-service medical plans (without prescription drug coverage) in 2002, and a 14.0 percent increase in plans that include prescription drugs. Prescription drug plan costs alone are projected to increase 20.5 percent for retirees.

As of January 1, 2002, pre-Medicare (under age 65) retirees of 18 state governments paid the full cost of their health insurance (under the state plan), and retirees age 65 and older (with Medicare) paid the full cost of health insurance in 20 states. The costs can be astronomical, especially when considered in relation to retiree income. In Indiana, single coverage for pre-Medicare retirees is \$283.49 per month under the state's indemnity plan; it varies from \$281.65 to \$409.08 under the HMO options; while family coverage is \$793.87 per month under the indemnity plan and varies from \$746.38 to \$1,048.70 under the HMOs. Indiana is one of two states (the other is Nebraska) that do not provide coverage under the state-sponsored plan for retirees once they become Medicare-eligible at age 65. In Wisconsin, pre-Medicare retirees pay \$428.60 and Medicare-eligible retirees pay \$330.50 for single coverage under the state's standard plan, while the family rate is \$1,033.30 for pre-Medicare retirees (two persons, both under age 65) and \$637.00 for Medicare-eligible retirees. (Health care costs are from Workplace Economics' *2002 State Employee Benefits Survey*.)

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Retirement Income Security

The advantages of many public sector pension plans are found in their design: defined-benefit pensions that provide a secure level of retirement income that rises with length of service and compensation.

Public sector employers have been credited with providing relatively generous pensions. Many public employers offer their employees defined-benefit pensions that provide a reasonably good retirement income to employees. This advantage of public employment should be emphasized as a tool for both recruitment and retention. Although mid-career and older employees are most likely to be concerned with retirement income needs, today's younger employees are increasingly concerned about saving for the future. Through collective bargaining, employers and employees can work to enhance pension and related benefits in a manner that ensures the income security and quality of life, both at work and in retirement, for both current and future employees.

The advantages of many public sector pension plans are found in their design: defined-benefit pensions that provide a secure level of retirement income that rises with length of service and compensation. In addition, many public jurisdictions—all 50 states, for example—provide some form of voluntary deferred compensation or savings plan. And, as noted previously, many public employers provide (or make available for purchase) health care benefits for retirees and their families.

Pensions have long been viewed as a tool for retention of employees, in that 1) a minimum length of service of 5 years or longer (5 years in the private sector) is generally required for vesting of benefits, and 2) the size of the retirement benefit increases with service (under a defined-benefit plan). Both of these features have the effect of enticing employees to stay with an employer at least long enough to become vested, and once vested, to continue working until adequate pension benefits are acquired.

The same features that may have worked in the past to retain long-service employees, however, have more recently been viewed as negatives to attracting new employees. In some cases, certain features of pension plans and related regulations or policies may actually encourage early retirement of experienced employees.

Portability—the ability of employees to “take their pension benefits with them” when they change employers, rather than to sacrifice future benefits, has been cited as a drawback of traditional defined-benefit plans. Portability helps employees who do not wish to remain with the same employer for a long time. It has, therefore, been viewed as useful in recruiting younger employees. North Dakota has crafted a hybrid pension plan called the “portability enhancement program.” This plan maintains support for their defined benefit, however, it offers employees portability options through an additional voluntary defined compensation program.

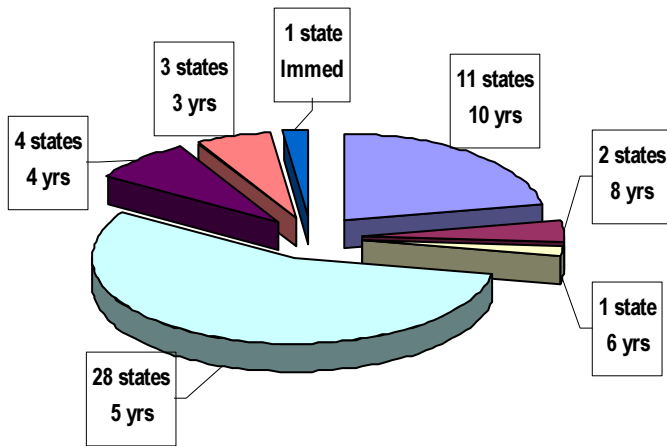
Defined contribution plans, such as the 401k plans popular in the private sector, are thought to be more portable than defined benefit plans, but this is not the case. Participants of any type of plan—defined benefit or defined

contribution—vest in their own contributions immediately, but vesting rights in employer contributions depend on the specific provisions of each plan and may be no shorter under defined-contribution plans than under defined benefit plans. When considering retirement income alternatives, negotiators, pension trustees and plan administrators must ensure that options that enhance choices for employees do not sacrifice retirement income security.

While not strictly providing portability, reduction of vesting requirements in an existing pension plan enables employees to acquire rights to pension benefits that they will not forfeit even if they change employers. Private sector pension plans are required to provide vesting in no more than five years, and policy makers are currently considering regulatory changes that would reduce vesting to three years in the private sector. Although the trend in the public sector has been to reduce vesting from 10 to five years or less many public plans still do not allow employees to vest in their pension benefits for eight or 10 years. While the longer vesting period may, arguably, have some small positive effect on retention (an eight year employee, for example, may be enticed to stay on for at least two more years), a shorter vesting time would be most likely to attract new employees given that five year vesting is now the private sector norm.

The chart below shows vesting periods in effect for state government

Vesting Periods in State Pension Plans



Source: 2002 State Employee Benefits Survey

pension plans. Currently, 36 states offer vesting in five years or less. In 1992, 24 states offered five year vesting, and just four states offered vesting in less than five years (four year vesting in each case).

In recent years, many public sector jurisdictions have modified or augmented traditional pension plan arrangements to provide employees with options as to the type of pension plan they will participate in or the form and timing of benefits they receive. One such arrangement is known as a “deferred retirement option program” or DROP plan. The DROP can be a

useful tool to retain experienced employees as a way of phasing toward full retirement. Under a DROP plan, an employee qualifying for normal retirement benefits may choose to continue working for some period but also begin to collect retirement benefits, which are paid into an account during this period. At the end of the period, the employee stops working and receives the retirement benefits in a lump-sum payment. He or she also begins to receive regular retirement benefits at this time, but the benefits are calculated as if retirement had occurred at the beginning of the DROP period.

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The value of the DROP in retaining employees is that it provides an additional option for employees to receive part of their retirement benefits up front in a lump-sum payment, which may be desirable for some employees. However, the reduced monthly check may be seen as a disadvantage by others. Moreover, those who select the DROP option may well forgo any improvements to the defined-benefit plan that occur during the DROP period. DROPs may have other pluses or minuses, depending on whether and how the individual receives raises during the DROP period and the treatment of benefits, such as health or life insurance. While the actuarial value of the benefits may be the same whether the employee selects the DROP option or not, the value of the timing and form of benefits may differ significantly among employees. A DROP provision can be constructed to be cost neutral to the plan over the long term, but differences in timing of both employer and employee (if applicable) pension contributions and the lump-sum payouts can affect the financial administration of the plan. These and other considerations must be examined relative to the expected value of a DROP or similar provision as a recruitment and retention tool.

Some public jurisdictions may be able to retain experienced employees who might otherwise retire by removing barriers to rehiring retirees. In Montana, for example, state and local government and classified school employees who have retired under the Public Employee Retirement System (PERS) can work up to 640 hours each fiscal year without jeopardizing receipt of their pension benefits. Another issue for retirees considering a return to public service is whether re-employment by the same jurisdiction might affect the payment of health insurance premiums. While removing barriers to re-employment might be attractive to employers and retirees, the potential of such actions on current or future employees must be considered as well. If rehiring retirees becomes sufficiently inexpensive, public employers might be tempted to use this strategy in the short term instead of focusing their efforts on recruiting new employees or retaining mid-career employees.

The complexity of pension plans requires that any proposed alterations in existing plans be carefully analyzed with respect to their potential impact on retirement benefits. Plan modifications may have very different effects on different groups of employees, on plan beneficiaries, on the employer and

on the plan itself. While pension plans may be useful tools in supporting and improving employee recruitment and retention, their primary goal remains the provision of retirement income security.

Even without making changes to existing pension systems, the most important tool for improving both retirement income security and recruitment and retention in the public sector is compensation. Pension plans of all types simply provide a mechanism to pay former employees a portion of the income they received while on the job. If their compensation while employed is not competitive, then their retirement income will be no better. Even the richest defined-benefit plans cannot make up for compensation that was never received, and employee contributions to defined contribution plans are limited by earnings as well.

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Strategy Bundles

There is no one size fits all strategy to attract and retain public employees. Unions must work to insure that employees are offered choices in a variety of strategies. After working with Dr. Linda Duxbury, the task force chose to group the recommended tools into a variety of bundled strategies. These include:

- Career development
- Remuneration
- Job flexibility
- Lifestyle
- High roller
- Body and mind

Within the strategies are tools that will be attractive to the different generational cohorts. Unions should be sure that all cohorts are considered when putting a plan together, to maximize the candidate pool and retain employees of all ages. We must aim to create a work environment that is attractive to older workers who are reaching retirement as well as younger workers entering the workforce. None of these tools alone can fix the problems—they must be utilized in a comprehensive package to achieve maximum success. Unions should review the options discussed in the report and consider which tools are best for the membership and potential membership in order to maintain a high level of quality services to the public.

The strategies detailed herein provide a variety of options to insure that public service employment possibilities reach a vast range of candidates. In order for the public service to become an employer of choice for employees in every generation, unions should consider many different tools. All of these strategies are not necessarily costly or free to develop. The tools range from establishing “breakfast with managers” meetings, which can be relatively costless, to subsidized dental care and tuition reimbursement. Before developing a recruitment and retention strategy, the union should survey the membership to understand what their current membership is looking for. How many people identify with each of the different strategies?

The goal of an established recruitment and retention plan is to have many different options from all of these strategies available for potential employees – whatever their age or their work history.

If the membership indicates that career development is important, career development tools attractive to each generation might be promoted. For example, younger people report that they value tuition reimbursement and loan-forgiveness programs to achieve their career goals while Baby Boomers and the Traditionalists indicate that they prefer on the job training. If the union only advocates for one of these tools, it will appeal to only a certain percentage of the targeted population. The goal of an established recruitment and retention plan is to have many different options from all of these strategies available for potential employees – whatever their age or their work history.

Career Development Strategy

Prospective employees and public employees demand a career development program from their employers. If we are to attract knowledge workers to public employment in the 21st century, public employers must put together career development opportunities for their staff. Individuals are attracted to organizations that are committed to employee growth, and they stay where they feel valued. Many employees are attracted to a job based on its career development opportunities and will leave a job if these opportunities are not offered or are cut short.

Carol Chetkovich, author of *Winning the Best and Brightest: Increasing the Attraction of Public Service*, states that public policy graduate students are drawn to the private sector for professional development, intellectual challenge and advancement opportunities as well as the financial benefits. Students who study public policy feel that these options and opportunities do not exist in the public sector. The attractiveness of a professional development program cannot be minimized in the public sector. Twenty-first century employees seek to work for employers who value them and invest in their future.

In examining strategies to recruit and retain public employee knowledge workers, career development opportunities are an attractive possibility for all generations of workers. Knowledge workers indicate a desire for their employer to actively participate in career development. Depending on the age of the worker or potential employee, the definition of how this career development is implemented may vary.

Continuing education: All workers are looking to the employer to assist them in continuing their education and learning new skills. This becomes more important in the digital age with changes in technology. Younger employees desire programs including *tuition reimbursement* while Baby Boomers and Traditionalists indicate a preference for *on-the-job training*. All public employers should examine continuing education programs and seek ways to improve them. The majority of public employers do not come close to providing an adequate continuing education program.

Loan repayment: For college graduates interested in public service, debt burden is a serious consideration in their choice of jobs. Many students indicate a desire to serve the public but are unable to repay their school loans on the salaries offered in public employment. This reality cannot be understated. Loan-repayment programs are popular in the healthcare field (nursing, physicians and dentists), and teaching (K-12 and faculty). These programs provide financial assistance whereby the public employer pays the creditor directly for a specified amount of money. The federal sector has recently expanded its loan-repayment program for employees in national security jobs and other employees in legislative branch agencies. Eligible

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federal employees can receive up to \$6,000 a year, or a total of \$40,000 per employee on loan repayments.

States have also begun offering loan repayment as a way to recruit for hard-to-staff rural or inner-city locations. These programs have proven themselves to be extremely effective in motivating college graduates to careers in public service.

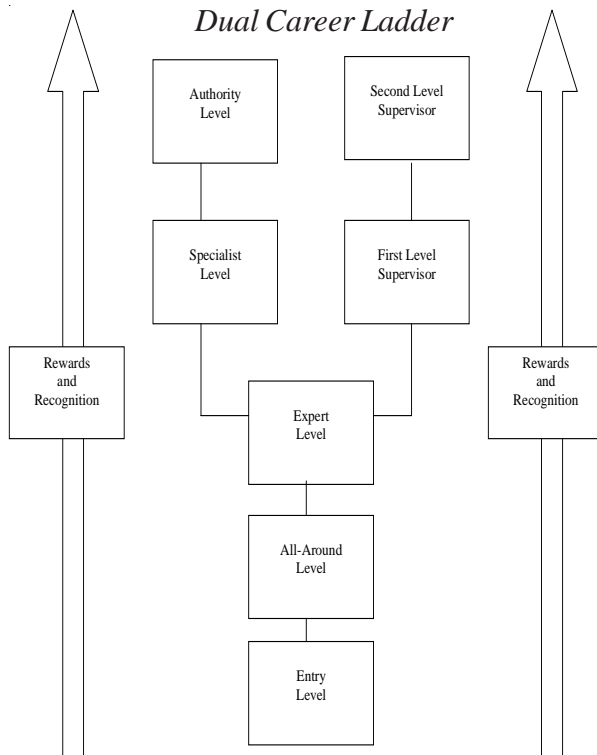
Loan forgiveness: This program differs from loan repayment. For example, if a state employer makes the original loan to the student and if the student chooses public service, the loan is forgiven. Nationally, the federal government has a program to cancel federal educational loans if a student does volunteer work (Peace Corps), the military, and specific teaching, medical and legal jobs. See <http://www.finaid.org/loans/forgiveness.phtml>. Expanding and developing programs for loan forgiveness and advertising such programs would greatly expand the applicant pool in many public employee jobs.

Continuing legal education and license payments: The licenses of some employees are required to be current. This may require continuing education. Accountants, engineers, lawyers, dentists and nurses all must carry a license. Public employers should offer all employees assistance in maintaining their licenses. Not only should the employer pay for the license renewal, but the employer should also offer assistance in the classes necessary to maintain accreditation.

Career coaching: All employees should have the opportunity to sit down with their supervisor or human resource manager and discuss their career path in public service. Employees should have a vision of how they can advance in their agency. Each employee can be given a clear plan for achieving her/his career goals. ***Career management workshops*** should be offered to employees by the employer and/or the union. All employees need to be coached on making public service an exciting career.

Dual career ladders are defined as separate career paths: one provides advancement opportunities based on technical development and achievement, and the other promotes into management classifications.

Dual career ladders: In most instances, public employee career ladders allow for advancement only through promotion into the management ranks. For employees who have trained for years in their respective fields, this is not an attractive option. Dual career ladders are defined as separate career paths: one provides advancement opportunities based on technical development and achievement, and the other promotes into management classifications. These dual career ladders allow employees who don't want to be managers to advance and get salary increases based on their technical knowledge. The public sector does not "lose" its most senior technical employees who may have little interest in managing employees. These programs have been extremely effective retention tools in job classifications for research, engineering, informational technology and medicine.



Source: Keeping Your Valuable Employees, p 153: Susan Dibble, 1999

Streamlined internal transfer process: Union members are often frustrated by the extensive internal process necessary to transfer between public agencies. Employers and unions should work together to ease the internal transfer process as well as the initial hiring process. It should not take more than 90 days for an internal transfer or an initial hire to take effect. If employees recognize that there are many opportunities to advance throughout public service, they may be more likely to continue employment.

Evaluations: Public employee evaluation tools are too often only related to an employee's compensation. An effective evaluation tool should spend time discussing an employee's career development opportunities and develop a pro-active plan to realize an employee's career development goals. An evaluation tool should include a section for career development initiatives. This will provide employees with another avenue to express work goals with management.

Mentoring: Employers and unions should work together to create an innovative mentoring experience for new hires. Public service employment has its own unique set of circumstances and work conditions that often leave new employees feeling overwhelmed. This is not a good way to begin an employment relationship. A well-thought-out mentoring program can assist new employees in understanding public service organizational culture and values as well as provide a general transfer of knowledge from a more experienced employee to a new employee and vice versa.

Public service employment has its own unique set of circumstances and work conditions that often leave new employees feeling overwhelmed.

Remuneration Strategy

Many current and future employees are attracted solely to the compensation and benefits offered by the public service (see earlier sections on these topics). No matter what else is offered, their interest revolves around their pay and benefits and items that affect one's compensation. Often, when public employers are close to market pay, other remuneration factors and tools may help to sway this group.

Compensation: Salary is the most important tool in any recruitment and retention plan. Public employees and potential public employees look first to the wage package in virtually every instance. To attract and retain a quality public work force, equitable wages must be paid commensurate with comparable jobs in the relevant labor market.

Health insurance benefits: As insurance costs rise, a substantial benefit package becomes a more important consideration to people contemplating public service. Public employers must be able to offer a benefit package that is an attractive consideration for employees.

Dental and vision insurance: Both have been described as an attractive tool that often convinces someone to come to public service. Public employers are often large enough employers to have the clout to negotiate reduced premium rates.

Pre-tax flexible benefits spending account: Currently only nine states do not offer some type of pre-tax insurance plan options. All states offer some type of pre-tax plan for child care costs. This has been a popular offering that can be replicated with local government employees.

Child care: This is a very attractive tool for employees in Generations X and Y. Many employers now offer on-site day care options or subsidized off-site day care. This can be one benefit that makes the difference in an employee's choice to work for public service. One Pennsylvania insurance company goes so far as crediting their child care facility as one of their main retention tools – 100 percent of the employees with kids in their day care center have remained with the company. Vermont directly subsidizes day care for employees who make less than \$60,000.

Elder care assistance: With more employees in the sandwich generation, both raising children and taking care of elderly parents, more companies are providing employees with elder care assistance. At least 15 states provide elder care assistance through pre-tax dependent care accounts. A few others have negotiated leave time to help employees juggle the increased responsibilities of elderly parents. One private sector example is of an employer contracting with a geriatric care management program. They recognized that adult care responsibilities affect employees

Adult care responsibilities affect employees emotionally, physically and financially.

emotionally, physically and financially. Employees cannot give their best efforts while worried about their loved ones. Any assistance in this area offered by their employer is appreciated.

Pension portability: Defined benefit with a provision for pension portability. This is attractive to people who may not be interested in public employment for a career until retirement.

Sick leave cash out: Currently, only six states do not allow sick leave cash out for state employees for any reason. Many states are beginning to negotiate over the use of an employee's sick leave accumulation. Public employers have used the idea of transferring one's sick leave accumulation into a health insurance premium at retirement or toward one's final retirement calculation as an retention incentive.

Domestic partner benefits: Domestic partner benefits have become an important recruitment and retention tool in the public sector. It sends a message that the public sector values **all** employees and is a tool used more frequently in the private sector. Recent reports from the Human Rights Campaign indicate that 4,400 employers across the nation currently offer domestic partner benefits, including 138 cities and states and 166 colleges and universities. (see the web site at <http://www.hrc.org>.) There is no doubt that this is attractive to a certain percentage of the working population.

Disability insurance: Both long-term and short-term insurance options can work as recruitment and retention tools. Nineteen states provide short-term disability, and 20 provide long-term disability coverage.

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Job Flexibility Strategy

This strategy is attractive to all generations of workers for different reasons. Knowledge workers desire more control over their working professional lives. This strategy offers public employees the opportunity to design their work schedule which results in more work getting done. Alternative work schedules and telework/telecommuting are beginning to take off as essential job flexibility strategies for the public sector. Job flexibility offers employees another tool to balance their work and family lives.

Alternative Work Schedules: These scheduling options offer alternatives to a traditional five day, eight hours a day schedule. One example is a compressed work week (four 10 hour days or three-12 hour days, for example). Another is flex time, which typically identifies “core” hours during which employees must be on the job. Many private sector businesses have recognized that providing employees with scheduling options is an effective recruitment and retention tool. For public sector employers who often struggle to provide a competitive wage, providing alternative work schedules is a must. In large urban areas, flex time offers employees the opportunities to commute when congestion is reduced. Connecticut professionals in the Administrative and Residual Employees Union (A&R) negotiated strong contract language on this topic, and the federal government offers its employees many different scheduling options. Alternative work schedules offer employees more control over their work environment, increased time with their families and can potentially reduce absenteeism by allowing employees flexibility in scheduling. This option is inexpensive to the employer and attractive to all generations of workers.

Telework/Telecommuting: Telework is defined as a work arrangement whereby selected employees are allowed to perform the normal duties and responsibilities of their position through the use of computers or telecommunications, at home or another place apart from the employee’s usual place of work. With the new technology available, the public sector has begun to see the attraction of teleworking. Workers who telework on a regular, recurring or occasional basis report a much higher level of job satisfaction because of their ability to work outside of the office. A number of states have dramatically increased the use of telework in the past decade. Arizona now boasts that 15 percent of the state’s work force teleworks at least a few times a month. For a more extensive briefing on telework, see the 2002 AFT Public Employees Digital Government Task Force report.

Part time options: An opportunity for a voluntary part-time schedule is something that often entices public employees to continue employment. As an employee’s work life changes, her needs often require a move to a

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part-time schedule. Employees who need this and do not have the option available will change jobs. Older workers utilize part-time options when they wish to reduce their number of hours toward the end of their careers. Public employers should have myriad work schedule options to accommodate all employees.

Voluntary job sharing: An employment arrangement in which two workers voluntarily share the responsibilities of a single position. There are different options to make this work. One popular example is that both employees work three days a week – working together once a week to catch up. The team is considered to be 1.2 employees and is each paid 60 percent of salary. This opportunity has become very popular with Generation X and Generation Y employees who desire to job share while raising families.

Phased in or graduated retirement: This option allows older employees to reduce their hours for a period of time before retirement. Many workers prefer to leave the work force in transitional steps, and employers do not like to lose skilled workers to full retirement immediately.

Lifestyle Strategy

There is a population of employees who are attracted to options included in the “lifestyle” strategy. The following tools should be considered when trying to appeal to these employees. More personal and family time has become one of the greatest “perks” that an employer can provide.

Increased vacation time: Employees in the Baby Boom or Traditional generation often cite increased vacation time as a reason to continue with their employer or choose to work for government. Employees who have progressed in seniority and earn four weeks of vacation in one job will often not change jobs to work for the government unless they are promised a similar level of vacation benefits. The Commonwealth of Virginia adopted a program that allows agencies to grant or advance up to 30 days of annual leave during a leave year to new and existing employees as an incentive to accept or continue employment with the state. Additionally, the state agency has the flexibility to pay employees for unused vacation leave.

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Workloads: Employees often cite an enormous workload as one of the reasons that they leave government employment. The workload becomes unmanageable. All generations of public employees suffer when a public employer refuses to address workload issues. For all generations of workers, excessive workload has a negative effect on employee morale. In some job classes across the country, double-digit turnover can be directly related to excessive workload. Employers of choice offer employees a good balance between work and family life and insure that the workload is manageable.

Breakfast with managers: Employees in Generation Y report an interest in conversing with managers who are higher up in the agency. Younger employees feel that managers will learn to understand their needs better with casual, informal meetings on a regular basis. Younger workers respond very positively to this interaction with management. Older workers might find such an approach refreshing as well.

Skip level meetings: An effective retention tool that allows workers to voluntarily meet with the boss of their direct supervisor (skip a management level) on a regular basis. These meetings allow for a good exchange of ideas and feedback above the direct chain of command. These are not disciplinary in nature and are routine and casual meetings.

High Roller Strategy

This strategy appeals to people who will work for or stay in government if given a particular set of work enhancements, though in the public sector such tools are limited. There are potential employees who are attracted to the “jet set” with travel options, for example. The pay might not be what they would command in the private sector, but they value the opportunities for travel.

Office space: A clean safe space to work in is often overlooked in public service. All generations look favorably on a work space that is comfortable – Traditionalists and Baby Boomers welcome this tool more so than employees in other generations. Office space redesign and maintaining a safe work environment are good retention tools for all employees.

Promotion options: Dead-end jobs are discouraging to almost everyone. Employees in public or private sectors value the opportunity to advance to a higher level job with greater responsibility. Besides the status and prestige of advancement, employees welcome the opportunity to use and learn new skills.

Travel options: The opportunity to meet new people during occasional travel appeals to a segment of the population and should be promoted as a tool where applicable.

Parking space and parking reimbursement: This tool is especially popular with employees in urban locations where parking is expensive and at a premium.

Home loans: This tool is targeted primarily to the Generation X employee who is looking to buy her first home but might not have a down payment. Many cities and a few states have made arrangements for employees to qualify for special home loans based on their public service job.

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Body and Mind Strategy

This strategy works for potential employees and current employees who want their employer to respond to their individual needs.

Gym memberships: Many people are attracted to jobs that offer free or reduced-cost fitness center memberships. This option is not necessarily a cost prohibitive one: the public employer or union can often negotiate lower costs based on the numbers of employees who might potentially sign up for memberships. Additionally, the public sector often can provide for the use of on-site facilities (in universities, for example) for their employees.

Smoking cessation courses: West Virginia began offering fully paid smoking cessation courses for its employees. It was quite successful for state employees who wanted to stop but could not afford the prescriptions or therapies. It was deemed to be a creative benefit by the employees that participated in the program. Some health insurance providers offer lower premium rates for nonsmokers, providing an additional incentive for a smoking cessation program.

Eyeglass/hearing aid reimbursement: Employers who provide additional benefits for eyeglasses, hearing aids or cosmetic dental work can attract and retain Traditionalists and Baby Boomers.

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Conclusion

Recruitment and retention, like quality public services, is a union issue. These are issues that require employee and union involvement if they are to be addressed adequately. It makes good sense for labor and management to work cooperatively to plan and execute a work force strategy to deal with the rapidly changing demographics of the workplace. Much more needs to be done at all levels of government to plan for the massive loss of expertise that is clearly on the horizon with the retirement of experienced Baby Boomers who now play such a vital role in government service.

The costs associated with this turnover are extraordinary. Turnover costs alone can range anywhere from one third to one and a half times the employee's annual salary. Multiply this by the hundreds of thousands and even millions of public employees who will be leaving public service in the next several years and it is easy to see how state budgets will be affected. Add to these financial costs the dramatic loss of "know-how" that these departing employees represent; clearly quality public services are at risk.

This turnover will have dramatic implications for our union as well. We must understand the interests and concerns of the new generations of public employees to mobilize our membership effectively. Vacancies in positions now occupied by older workers will limit the institutional knowledge on the history and struggles of our union. Education about the accomplishments and benefits of union participation will need to be a continuing part of any union program, but these programs must also address the crucial contemporary issues facing public service. Whether employees have the right to union representation at the bargaining table or not, our union must find ways to communicate more effectively with members and potential members about the important issues facing government employees. Through these programs and communications, we can continue the growth and effectiveness that has made AFT Public Employee unions the leaders in improving the institutions where our members work.

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Recommendations of the AFT Public Employees Task Force on Recruitment and Retention Issues

To assist in the development of a more comprehensive nationwide strategy to address public employee recruitment and retention issues, the Task Force makes the following recommendations:

- 1. Public employee unions at all levels must be active in pursuing a complete work force assessment.** To address the problems resulting from changing demographics in the current and future work force and from the rapidly changing economy, employers and policy makers must have accurate information on the status of the public employee work force. All too often, our experience has been that no real work force assessment takes place at any level of government. Frequently, public employers end up reacting to changes in the work force that are forced upon them. Too little time is spent looking at the status of the work force with an eye to future needs.

Union leaders can play an active role in prompting better analysis of work force needs through labor-management initiatives, contract negotiations or through legislative initiatives.

Union leaders can play an active role in prompting better analysis of work force needs through labor-management initiatives, contract negotiations or through legislative initiatives. While work force analysis is often the obligation of an insightful employer, public employee unions cannot afford to wait for employers to take necessary action. Through our own advocacy, our union can play an active role to encourage greater work force planning. Any program like this works best with the involvement of public employees and other stakeholders with an interest in quality public services. From the start of the process through implementation and analysis, public employees and their unions can be valuable partners in assessing work force needs and future requirements.

With more accurate information about the current status of the public employee work force and future needs, labor-management partners can work more effectively to meet the needs for quality public services into the future. Accurate information is essential to any successful work force plan that the partners might launch.

- 2. Work force data needs to be collected on an ongoing basis to help government establish and maintain a coherent work force plan.** Implementing an effective work force plan requires continuous feedback on the results of actions taken to implement the work force plan. Limited data will yield limited

results. Any work force plan will include activities and programs that must be monitored for effectiveness. Only through regular surveys and analysis can work force planners stay in touch with what is really happening at the workplace. Mechanisms must be established to collect data on a regular basis and provide it to the work force partners to allow for timely initiatives and innovative approaches to developing changes in the work force environment.

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- 3. The union and management should work together to monitor and survey employee satisfaction levels.** Through a variety of tools, employee attitudes and recommendations can be taken into consideration in the design and flow of work. Giving employees greater involvement in workplace decision making and in the mission of the agency can yield greater satisfaction and better service to the public. If the employer refuses to get involved with surveying employees, the union can act to fill the void.

High-performance workplaces in both the public and private sector have long realized that the way to achieve high performance is to talk with the employees directly involved in providing the services. This practice needs to become more widespread in government at all levels. Public employees are well educated and well trained and generally have a depth of experience that makes them the essential ingredient in delivering high-quality government services.

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Too often, employees do not feel connected to the mission of the agency and feel hampered by layers of bureaucracy that limit initiative and judgment. By seeking greater involvement from employees and by acting on their ideas, government can be more responsive to the public as well as to the public employee work force. Involving public employees and their union representatives in work force planning and implementation can help connect employees to the mission of the agency and help the agency deliver services more effectively.

- 4. Public employee unions, government administrators and policy makers must work together to develop a strategy to address work force needs.** Analysis of current testing, hiring, promotion and transfer policies need to be conducted to determine whether or not these practices are meeting the expectations of current employees and the different generations of potential employees.

It only makes good sense to involve people with ideas and experience in how the government workplace works. Top down, status quo approaches in addressing hiring and career development programs can yield only limited results. Real results over the longer term will require involvement and partnership between those who

Partners may not always agree, but unions, employers and policy makers have a shared interest in improving government workplaces and making government service more attractive.

We can stave off this loss of expertise and move to attract the new generations of knowledge workers by giving employees greater flexibility in getting their jobs done and allowing for more innovative thinking.

Government must make more of an investment in training and professional development in order to keep and attract the best and brightest government professionals.

understand what is at stake if government employers are not perceived as an employer of choice.

Partners may not always agree, but unions, employers and policy makers have a shared interest in improving government workplaces and making government service more attractive. Overcoming obstacles that prevent improvement in government employment are much more likely where there is joint participation and involvement, rather than hierarchical decision making by the employer. All parties have experiences that should be put to work in designing better approaches that appeal to current employees as well as employees considering government service as a career.

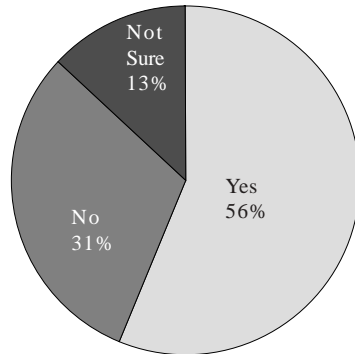
- 5. Steps must be taken to establish a learning, challenging environment that allows government employees to be innovative, productive, independent knowledge workers.** We are facing the current problems of recruitment and retention in the public sector because government employees are older and more experienced and are on the verge of retirement. We can stave off this loss of expertise and move to attract the new generations of knowledge workers by giving employees greater flexibility in getting their jobs done and allowing for more innovative thinking. In some cases, this approach is going to be threatening to supervisors more comfortable with the traditional hierarchical approach to getting the job done. But experienced, talented professionals in government service can get the job done better if their skills are acknowledged, respected and put to work constructively than if they are simply told what to do at each step.

Changes in technology and in our economy require government employees to keep up with continuous changes in their professions. Yet, government employers have always lagged in investing in meaningful training on an on going basis. Such a deficit is harmful to the quality of government services, it is discouraging to current employees, and makes government employment less attractive to the better candidates considering government service as a career.

Government must make more of an investment in training and professional development in order to keep and attract the best and brightest government professionals. While a majority of our members would seek government employment again if they had it to do over again, there is a sizable percentage that would not. Clearly, government employers must do more to develop the talents and skills of these professionals and allow them to use their professional judgment to get the job done better. By moving in this direction, employees will have a greater connection to the mission of the agency, greater satisfaction on the job and a better

opportunity to improve services to the public.

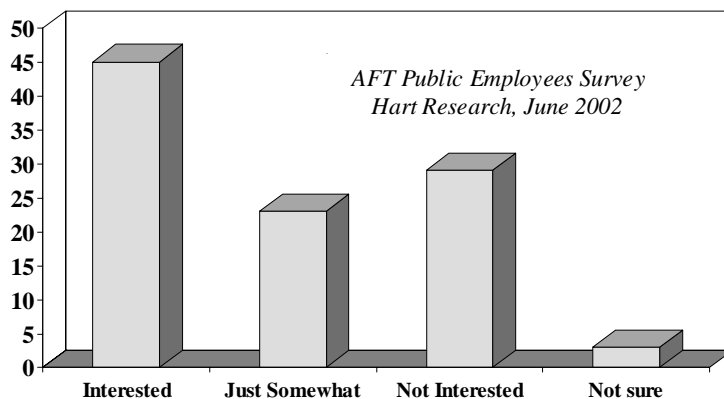
If you were starting in the job market again today, do you think that you would or would not choose to work for government?



*AFT Public Employees Survey
Hart Research, June 2002*

6. Individuals entering the work force have little exposure to the benefits of public employment because there is little being done to recruit and educate potential employees about the value of government work. Public employees have indicated a strong willingness to help with recruitment efforts, but these efforts need to be much more aggressive and pervasive. Low-tech job fairs and high-tech web sites and many forums in between offer opportunities for public employers to inform potential employees about the exciting and important work being done in government agencies across the board.

How interested would you be in helping your employer recruit applicants for job openings in your department or agency?



*AFT Public Employees Survey
Hart Research, June 2002*

Sadly, college graduates and other potential government employees often have little idea of what it is that government does or the

Without some knowledge of what government agencies do for the public, it is a wonder that talented applicants ever make their way to government employment at all.

contributions they could be making by working in government service. Without some knowledge of what government agencies do for the public, it is a wonder that talented applicants ever make their way to government employment at all. Little has been done to recruit top candidates for government service.

The rewards involved with government service need to be identified for potential candidates. Agency representatives should be at job fairs, making contact with potential employees, talking about the challenging work that government is doing. Again, no one can do it better than those who actually do the work. Promoting government jobs must become more of a priority at every possible venue whether it is one-on-one meetings or more remote web sites and advertisements.

- 7. Effective recruitment and retention programs require a cooperative labor-management partnership.** All of us have a stake in addressing recruitment and retention problems successfully. Where there is an established bargaining relationship, it may be easier to develop a cooperative approach to addressing these problems. But regardless of the bargaining status of the labor-management relationship, it makes sense for people to work together to address these issues. Government employers should welcome and solicit the involvement of employees and their unions.

The magnitude of these problems suggests that solutions are not going to come from ad hoc committees over the longer term. The parties should look to establish a partnership that will serve for the long haul. While such a structure could best be worked out in negotiations, employers can still move to draw upon the expertise of the union where employees have no bargaining rights, and similarly, unions can call upon employers to act to address these issues cooperatively.

All of the research on high performance workplaces suggests that this kind of cooperative approach is going to be necessary to get anything done over the longer term.

- 8. Real action on recruitment and retention issues will require real leadership.** Government and union leaders will have to play an advocacy role in educating people about the problems facing government service and call for action to address these problems. In order to address these problems effectively, our leaders must make public sector recruitment and retention a priority. Only through real leadership can we hope to gain the resources necessary to implement a meaningful plan of action to improve the government workplace and services to the public.

Nothing happens without someone pointing the way and creating a vision of what can be accomplished. This report can help illustrate what needs to be done and encourage leaders to speak out on the need to address recruitment and retention issues. If enough voices come together, we can hope to implement these recommendations, improve government workplaces and maintain quality services to the public.

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Appendix A

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The Aging Government Workforce: A Cause for Concern?

Highlights

- 46.3% of government workers are 45 years of age or older. This age group makes up just 31.2% of private sector workers. Replacing the large number of workers retiring in the next decade will be a great challenge for federal, state and local governments.
- From 1994 to 2001, the percentage of older workers in the government workforce increased more than the percentage of older workers in the private sector.
- Local governments, particularly in the New England and the Mid-Atlantic States, will face a retirement bubble in next decade.
- Nationally, 50% percent of government jobs are in occupations requiring specialized training, education or job skills compared to just 29% in the private sector.

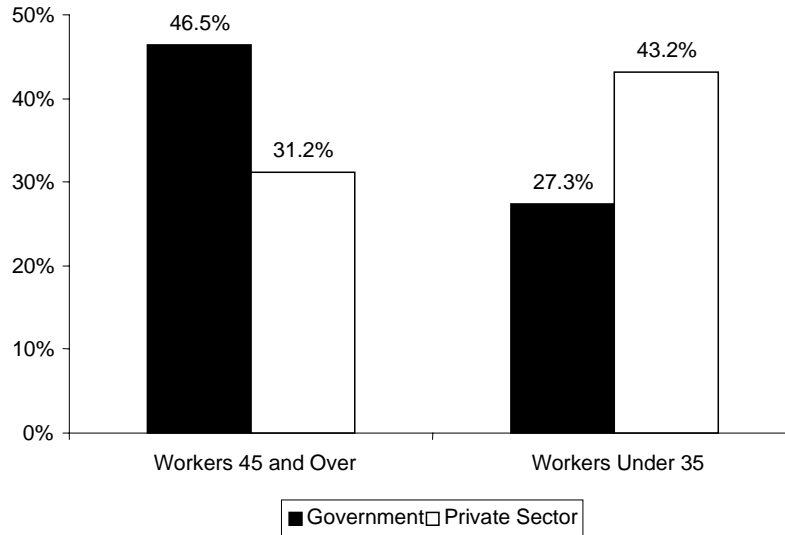
As the nation's population ages in the years ahead, employers will have to contend with the need to replace the growing numbers of retiring workers. This issue could be especially acute for federal, state, and local governments. Government workforces tend to be older than the private sector workforce and the proportion of workers age 45 and older has been growing faster in the government workforce than in the private sector. While the federal government has a higher share of workers 45 and over, local governments may face greater challenges in replacing retiring workers because they are much smaller and generally have fewer resources at their disposal. Further, the government workforce has a higher percentage of its workers age 45 and over in occupations that require specialized skills, education or training.

This brief compares the age distribution of the government workforce with that of the private sector, and examines recent trends in the age distribution of the workforce.

Older workers account for a large proportion of government employment. Almost half of the 20.6 million government workers in 2001 were 45 years of age or older.¹ In the private sector, wage and salary workers 45 years and older comprised only 31.2% of the workforce. That the private sector tends to employ younger workers can be seen in **Figure 1**. About 43% of private sector workers are under 35 years of age. In the government sector, young workers comprise only 27.3% of workers.

¹ These and other statistics in this report come from outgoing rotation group data from the Current Population Survey (CPS). The CPS is a monthly survey of about 50,000 households conducted by the U.S. Census Bureau for the U.S. Bureau of Labor Statistics. For more information on the CPS, see <http://www.bls.census.gov/cps/cpsmain.htm>, and for more information on the outgoing rotation group data see <http://www.nber.org/data/morg.html>. Note, that in earlier work by the Rockefeller Institute of Government on the aging government workforce, Samuel M. Ehrenhalt used the March 1998 demographic supplement to the CPS. (See Ehrenhalt, Samuel M. *Government Employment Report*, Rockefeller Institute of Government, June 1999). Therefore, estimates presented here will differ slightly from his earlier work.

Figure 1. Older and Younger Workers in Government and the Private Sector, 2001



The percentage of government and private sector workers 45 and over has been steadily increasing as the median age in the country has been increasing. In 1994, only 39.0% of government workers were 45 or older. Older government workers as a percentage of all government workers increased 7.5 percentage points from 1994 to 2001. In the private sector, 26.2% of workers were 45 or older in 1994. The private sector older worker share grew 5 percentage points from 1994 to 2001. The difference between the government sector and private sector increased from 12.8 percentage points in 1994 to 15.3 percentage points in 2001. See Figure 2.

Figure 2. Older Workers (45+) in Government and the Private Sector, 1994 to 2001

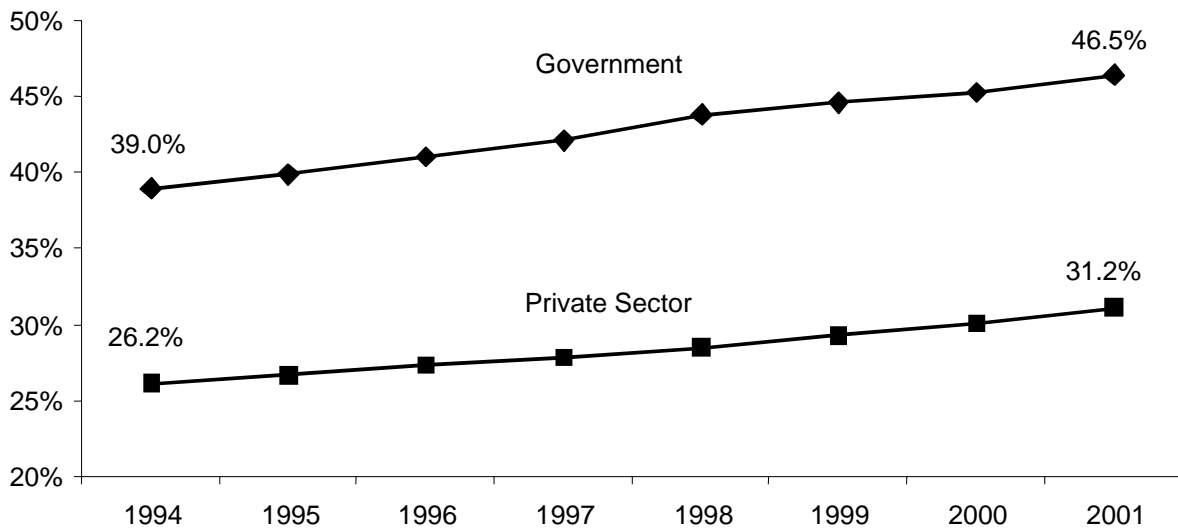
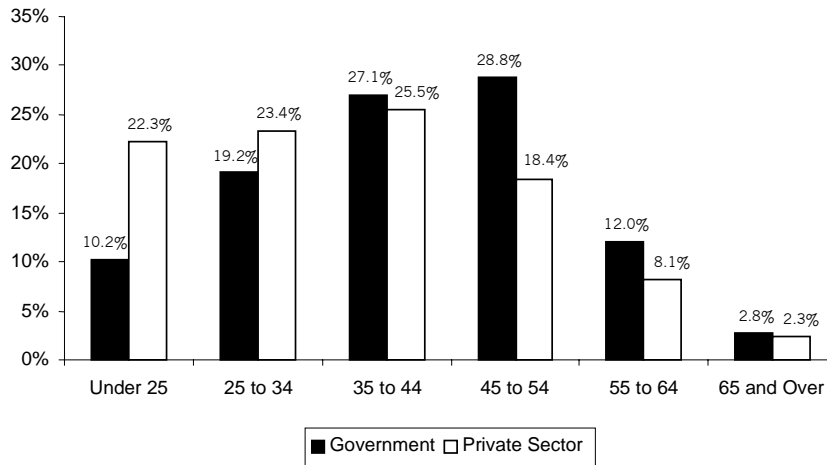


Figure 3 shows the age distribution of workers in government and the private sector. Workers under 25 comprise about 1 in 10 of the government workforce, while 1 in 5 private sector workers are in this age group, a difference of 12.1 percentage points. From ages 25 to 34, the gap narrows considerably to 4.2 percentage points. In the 35 to 44 age range, the percentage of private sector and government workers is roughly the same. A dramatic shift appears in the 45 to 54 age range. Almost 29% of government workers fall into the 45 to 54 group while only 18.4% of private sector workers are in this group. Workers in the 55 to 64 and 65 and over groups make-up larger shares of the government workforce than this age group does in the private sector.

Figure 3. Age Distribution of Government and Private Sector Workers, 2001



The differential between older and younger government workers varies across levels of government. **Figure 4** shows that older workers comprise about 50% of the federal government workforce. Only about 1 in 5 federal government workers is below 35 years of age. The gap between older and younger federal government workers is 28.4 percentage points. While slightly less pronounced, a similar pattern holds for local government workers with a difference of 19.5 percentage points. Older workers comprise 46.3% of local government workers, while younger workers make-up 26.9%. The state government workforce has a more even distribution of workers than the other two levels of government. Only 13.1 percentage points separate older state government workers (44.6%) from younger state government workers (31.5%).

Figure 4. Younger and Older Workers by Level of Government, 2001

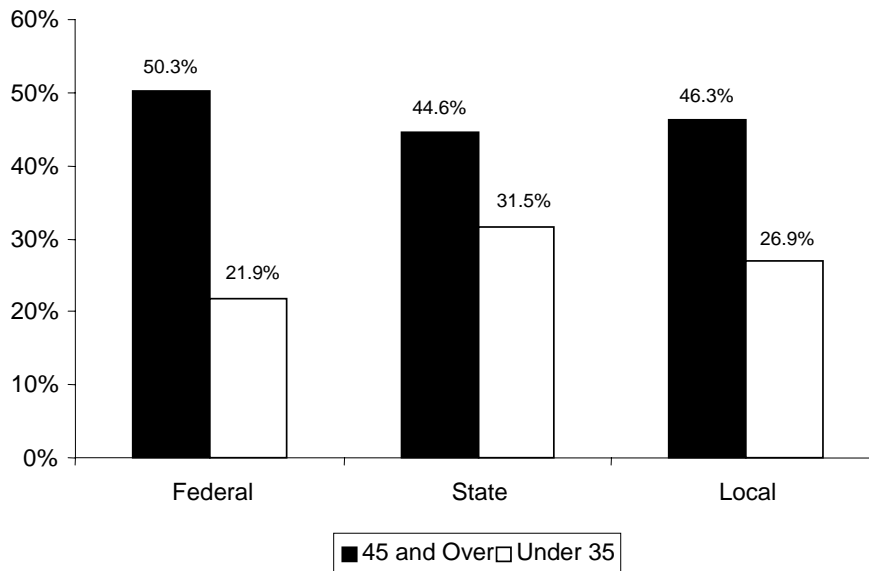


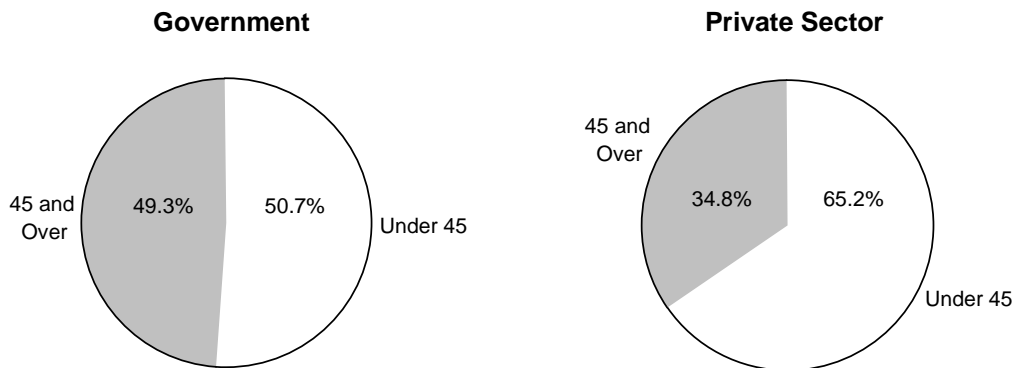
Table 1 shows the percent of workers 45 and older by U.S. Census regions.² In all regions, older workers comprise a larger portion in government than in the private sector. When all government workers are considered together, New England and Middle Atlantic states as a group have somewhat older government workers than other regions. For federal government workers, large proportions of older workers are found in the West North Central, South Atlantic, East South Central and Mountain region states. Notable for their relatively low percentage of older state government workers are the Mountain and West North Central regions. New England and the Middle Atlantic region stand out for relative higher percentages of older local government workers. In the private sector, the New England, Middle

Atlantic, and East North Central regions have relatively higher percentages of older workers than the nation as a whole.

	All	Government	Federal	State	Local	Private Sector
United States	46.5	46.5	50.3	44.6	46.3	31.2
New England	50.2	50.2	47.7	44.8	53.9	33.4
Middle Atlantic	48.0	48.0	48.4	47.6	48.1	33.3
East North Central	45.6	45.6	46.5	44.3	46.1	32.5
West North Central	45.8	45.8	55.0	41.0	46.8	31.7
South Atlantic	47.4	47.4	51.2	45.2	46.7	31.8
East South Central	47.1	47.1	54.7	45.8	45.3	31.6
West South Central	45.6	45.6	50.5	44.5	44.7	28.7
Mountain	46.0	46.0	51.0	41.9	46.7	29.1
Pacific	44.6	44.6	49.7	44.5	43.3	28.7

The prevalence of older workers is higher in occupations that require specialized education, training or skills. Examples of these “knowledge workers” include health care workers, legal professionals, natural scientists, engineers, educators and managers. Over 50% of government workers are in occupations that fall into the knowledge worker category compared to about 29% in the private sector. **Figure 5** shows that older workers comprise 49.3% of knowledge workers in government while older workers comprise 34.8% of private sector knowledge workers. In the looming retirement boom, federal, state and local governments will have to replace a greater percentage of knowledge workers than the private sector. Although the gap between the government and private sector percentages is narrower for knowledge workers than for all workers (14.5 percentage points versus 15.3 percentage points), it is clear that governments will face greater challenges to replace knowledge workers in the next decade than will the private sector.

FIGURE 5. KNOWLEDGE WORKERS 45 AND OVER AND UNDER 45 IN GOVERNMENT AND PRIVATE SECTOR, 2001



The Nelson A. Rockefeller Institute of Government is the public policy research arm of the State University of New York. Craig Abbey is a researcher associated with the Institute. Donald Boyd is the Deputy Director of the Institute and director of its Fiscal Studies Program.

² The U.S. Census Regions are composed as follows: *New England*: ME, NH, VT, MA, RI, CT; *Middle Atlantic*: NY, NJ, PE; *East North Central*: OH, IN, IL, MI, WI; *West North Central*: MN, IA, MO, ND, SD, NE, KS; *South Atlantic*: DE, MD, DC, VA, WV, NC, SC, GA, FL; *East South Central*: KY, TN, AL, MS; *West South Central*: AR, LA, OK, TX; *Mountain*: MT, ID, WY, CO, NM, AZ, UT, NV; *Pacific*: WA, OR, CA, AK, HI.

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