2017

Succession Planning Strategies in the Air National Guard to Retain Skilled Workers

Daniel Rodarte
Walden University

<u>Walden University</u>

College of Management and Technology

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Daniel Rodarte

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Review Committee
Dr. Carol-Anne Faint, Committee Chairperson, Doctor of Business Administration Faculty

Dr. Romuel Nafarrete, Committee Member, Doctor of Business Administration Faculty

Dr. John House, University Reviewer, Doctor of Business Administration Faculty

Chief Academic Officer
Eric Riedel, Ph.D.

Walden University
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Abstract

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Daniel Rodarte

MS.HR, Chapman University, 2004

BA, St. Martins University, 2001

Doctoral Study Submitted in Partial Fulfillment

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Doctor of Business Administration

Walden University

April 2017

Abstract

The military faces unprecedented limitation of resources due to fiscal cuts through all branches of service. The purpose of this qualitative case study was to explore succession planning (SP) strategies used by Air National Guard leaders to retain skilled workers. The target population consisted of 5 leaders of the Washington Air National Guard (ANG) with a minimum of 5 years of experience in the ANG. The five tenured candidates were selected given proven leadership performance, ability to influence the organization, and they provided institutional knowledge and corporate insight of SP efforts spanning nearly a century. Additionally, these leaders had direct first-hand experience with local selective retention process and successful force management practices. The conceptual framework included organizational leadership theory, succession theory, and employee retention. Semistructured interviews were conducted and relevant documents collected. All interpretations from the data were subjected to member checking to ensure trustworthiness of findings. Coding, clustering, and thematic analysis were methods used for data analysis. Prominent ideas and actions taken were coded, common codes were clustered and themes evolved. Based on the methodological triangulation of data, 5 themes surfaced: (a) skills focus verses strategic, (b) informal verses formal SP, (c) individual verses organizational, (d) priority for retention verses recruitment, and (e) limited skill leads to mission gaps. The application of the findings from the study may contribute to social change by inspiring military leadership to adopt more strategic succession planning and ensure business sustainability by changing existing SP from a recruitment-based technique to culture of retention.

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Dedication

I dedicate this dissertation to all service members, who are currently serving, have served, or who paid the ultimate price while serving. To my fellow Guardsmen you are an inspiration each and every day. I dedicate this work to my immediate and extended family, thank you for your support, and encouragement throughout my doctoral journey.

Acknowledgments

I would like to thank my partner and best friend, Dani, whose support and encouragement in this journey was invaluable. My parents, Mr. Robert and Marlene Rodarte, who taught me to work hard for what is important and to never give up. To my siblings RR, TR, BG, HG, RG who inspire me to strive for excellence. To all of my nieces and nephews, this journey is an example to each of you; when you focus your mind and put in the work, you can accomplish even more than you ever imagined. I also thank my committee chair, Dr. Carol-Anne Faint, your patience and encouragement was vital to my success. Likewise thanks to Dr. Romuel Nafarrete, and Dr. John House.

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Section 1: Foundation of the Study

The Washington Military Department's budget decreased 38% in the last 2 years; to meet the challenges of declining budgets and global recession the military department must maximize efficiency wherever possible (Washington Military Department[WMD], 2012). The ongoing fiscal decline and ever-changing mission of the Air National Guard (ANG) suggests a need for leveraging organizational efficiency. Leaders need to modify aspects of their organizational culture to create an environment that facilitates leadership retention, healthy succession planning (SP), and effective transition (Gothard & Austin, 2014). Succession management is a process of determining critical roles within a company, identification and assessment of successors, and equipping those successors with the skills for present and future roles (Stadler, 2011). The ANG presents a unique opportunity to apply succession planning given the varied generations in the workplace (WMD, 2012). Researchers supporting the theory of generations have suggested various trends affecting members of different generations specifically due to differences in career and life stages (Lyons & Kuron, 2014). Organizational leaders positively improve performance through SP and successor development (Wang Watkins, Harris, Spicer, 2004). In this section, I provide the overarching business problem, conceptual framework, and methodology for the study as well as a detailed literature review. In Section 2, I further the discourse on method and discuss ethical research, data collection, and data analysis. In Section 3, I provide findings from the study, implications, and recommendations.

Background of the Problem

Military retention in the United States Air Force (USAF) is low partially due to the high operational tempo maintained for 12 years of overseas operations in the Middle East (Department of Defense [DOD], 2012). The National Guard (NG) competes with the active duty workforce for fiscal resources (McKinley, 2010). The Program Objective Memorandum (POM) is an annual memorandum submitted by the Secretary of Defense recommending the total resource requirements and programs for Department of Defense (DOD) components (Defense Acquisition University, 2010). The active duty Air Force $144 billion budget vastly exceeds that of the ANG $2 billion budget (DOD, 2013). The continued fiscal strain, coupled with unclear succession plans, influence retention rates of the federal dual status workforce (WMD, 2012). The aging federal workforce eligible for retirement in 2016 represents a growing business problem in retention of primary leadership for the NG (DOD, 2012). Despite the critical importance of fiscal year 2013 cuts, combined with issues related to wartime operations, the large shortfalls in FY 2013 operating funds force the military services to shut down training for some units, which could harm military readiness (Panetta, 2012). The budget contains funding for military health systems to provide high quality care to military personnel on active duty, their dependents, and retirees. The United States has unresolved questions about what national defense and homeland security strategies should be (Lowenberg, 2005).

Problem Statement

Guardsmen are the most important asset of the ANG, and retention is essential for the NG as an operational force (Senate Appropriations Committee [SAC], 2012). The

DOD faces a $259 billion reduction over the next 5 years; the NG must define competitive value within the DOD in a fiscal crisis (DOD, 2012). Nearly 50% of the U.S. workforce becomes eligible for retirement by the year 2030 (U.S. Census Bureau [USCB], 2010). The general business problem is that the loss of skilled and qualified employees in the ANG lowers organizational performance. The specific problem is some ANG leaders lack SP strategies to retain skilled workers.

Purpose Statement

The purpose of this qualitative case study is to explore SP strategies used by ANG leaders to retain skilled workers. The population of ANG senior leadership in the WMD participating in the civil service retirement system reflects the typical demographic throughout the nation (DOD, 2012). The location represents a typical ANG organization with a standard distribution of skilled workers engaged in the 20-year federal civil service retirement system (Clarke & Kelk, 2014). This study may affect social change by potentially strengthening organizational and community relationships and building corporate continuity by improving employee retention.

Nature of the Study

I considered multiple methods of research including quantitative, mixed methods and qualitative approaches. Quantitative researchers focus on measurements and amounts of the characteristics displayed by people and events (Thomas, 2003). Quantitative inquiry is not suitable for this study due to the necessity to gather numerical data, which would not identify the experiences of Air National Guardsmen. Moreover, a quantitative approach is collection of a variety of empirical data from personal experiences, introspection, life stories, interviews, observations, history, and interactions (Thomas, 2003). The mixed method approach combines qualitative and quantitative inquiry drawing on interviews and numerical analysis. In this case study, a quantitative approach is unsuitable; therefore, a mixed methods approach that applies quantitative inquiry techniques is also unsuitable. A qualitative method provides a researcher a broader understanding of the value of SP within the ANG; therefore, a qualitative method best suited this study (Gill, 2013).

The four qualitative research designs considered for my study included narrative research, ethnography, phenomenology, and case study. The narrative researcher focuses on exploring the life of an individual (Block & Weatherford, 2013). I did not use the narrative design because a narrative researcher provides a life story; thus, the design is not suitable for exploring perspectives on a phenomenon. Ethnography emerged as a relevant design used by researchers to understand how specific societal issues affect different facets or practices (Cruz & Higginbottom, 2013). Ethnographic research was inappropriate for this study because assessing the value of SP is not revealed through extended observation. Ethnographic researchers explore unique cultures, and the intent of the study is not to investigate a unique culture. Researchers use the phenomenological design to investigate lived experience by exploring a *snapshot* of experience (Gill, 2013). My intent was to explore perspectives on SP that may or may not reflect a current practice. A qualitative single-site case study was appropriate for the study because the approach could provide insight on SP strategies.

Research Question

The central research question guiding the study was:

RQ: What SP strategies do ANG leaders use to retain skilled workers?

Interview Questions

The following interview questions structured the investigation:

Q1. What is your current job title, and how long have you worked for this agency?

Q2. How many employees are in your work center?

Q3. What is the age range of personnel in your work center?

Q4. What is the retention rate in your work center?

Q5. How does your work center evaluate employee succession?

Q6. How would you describe the retirement eligibility patterns within the past 5 years?

Q7. How would you describe your organization's formal or informal succession plan?

Q8. How does your work center develop succession plans?

Q9. How important is employee retention?

Q10. How prepared is the organization to replace retiring employees?

Q11. What additional information can you provide to explain SP within the NG?

Conceptual Framework

Leadership theory model is the conceptual framework that guided the study. Bass (2009) stated a new leadership of charisma and transformational leadership adapted SP to meet organizational long-term goals. The manager or leader direct environmental factors for the immediate team, including tasks and technology, stress, physical distance, closeness, transfer of leadership and executive succession (Bass & Bass, 2009). Executive succession planning differences for executive leaders can account for as much as 45% of their organization's performance (Bass & Bass, 2009). Authority is power that legitimizes tradition, law, agreement, religion, and rights of succession (Bass & Bass, 2009). When a situation calls for action, the leader is instrumental in resolving problems. Effective leadership to meet such challenges is a product of succession from the experiences and actions of previous leadership that molded the leader (Bass & Bass, 2009). Successors are an important stakeholder group in the succession process, and are the key to effective succession is to find an optimal blend of well-timed mentoring (Wang et al., 2004). Four essential factors of SP are (a) successor development, (b) predecessor influence, (c) intergenerational relationships, and (d) management advice (Wang et al., 2004). Succession theory aids in understanding current and potential business practice related to business SP by adapting the traditional military force management principles into effective strategic succession (Zepeda, Bengtson, & Parylo, 2012). Small business provides samples of succession behavior scalable to any size of organization. Small business is the most prevalent form of business organizations accounting for 70% of all companies in European countries (Wang, et al., 2004). Wang et al., (2004) contended there existed an important link between succession issues and organizational performance of small businesses in the United Kingdom. Strategic leaders must be adept at finding common ground and achieving buy-in among stakeholders who have disparate organizational views and alternate agendas (Schoemaker, Krupp, & Howland, 2013).

Operational Definitions

Air National Guard (ANG): The ANG is a cost effective force providing both federal mission support and homeland forces to the states, territories and district (Clark & Kelk, 2014).

Air National Guard Strategic Master Plan (ANGSMP)*:* The Air National Guard Strategic Master Plan represents a collaborative field-driven effort between the Air National Guard Strategic Planning System and the National Guard Bureau. The overarching purpose of ANGSMP is to synergize the efforts of the Air Force strategic planning and programming process, National Guard strategic planning process, and Air National Guard strategic planning system (Clark & Kelk, 2014).

National Guard (NG): The NG represents more than 460, 000 Citizen-Soldiers and Airmen in the Army and Air National Guard (McKinley, 2010).

Force Management: A tool that provides states a vehicle to ensure a quality trained force, stable promotion, opportunities, for lower grade personnel and a viable combat ready force (Air National Guard Instruction, 2014).

Selective Retention: Considers the selective retention of retirement eligible officers/enlisted members who are deemed vital to the continuity of the ANG (ANGI, 2014).

Washington Military Department (WMD): The Washington Military Department is comprised of recognized leaders for state, regional, and national emergency support dedicated to a safe and secure Washington who are guardians of American interests at home and abroad (WMD, 2013).

Washington Military Department Strategic Plan (WMDSP): The Washington Military Department Strategic Plan is refers to a 5-year plan for the Washington Military Department (WMD, 2013).

Washington Air National Guard (WAANG): The Washington Air National Guard includes command of the following major organizations: The 141st Air Refueling Wing, Western Air Defense Sector, and the 194th Wing. These organizations are comprised of 2,200 members operating from military facilities in seven communities statewide (WMD, 2013).

Assumptions, Limitations, and Delimitations

In this section, I provide assumptions, limitations, and delimitations affecting the study. In a case study, the researcher identifies assumptions affecting the study. Additionally, the researcher identifies limitations of the current study and delimitations or breadth of the study.

Assumptions

Assumptions are unverified facts (Knight & Cross, 2012). Two main assumptions affected this study. First, I assumed a qualitative case study was appropriate to explore whether military leadership differentiates between force management and SP. The civil service workforce and military age demographic compel alignment prior to age 60 or minimum retirement age. The second research assumption was that the cost of replacing and training new employees exceeds the cost of maintaining qualified employees through succession plans. The third assumption was that participants answered the interview questions honestly and without bias.

Limitations

Limitations are potential weaknesses that are beyond the control of a researcher (Connelly, 2013). Results of the study are not generalizable and reflect the unique perceptions of selected participants from federal civil service in Washington State only. Research collected by one individual is prone to bias, and while I attempted to control bias in my approach, there may have been bias beyond my control including bias on behalf of participants in answering questions. Open-ended questions guide the interview process enabling participants to drive the content of the study.

Delimitations

Delimitations describe the scope and breadth of the study (Garg, 2012). The study is limited to Washington federal employees in exploring organizational attitudes of NG civil service employees relative to SP and employee retention (WMD, 2013). The study does not include other types of corporate organizations or state employees. However, information provided in the study may have merit for other states across the nation.

Significance of the Study

The case study may contribute to business by considering how SP affects the retention of a skilled workforce. The study focused on succession factors for federal civil service employees in the state of Washington that may effectively improve employee retention. The critical nexus of NG federal employees is their connection to the local community. Employee retention builds corporate continuity and community stability, which positively contributes to social change.

Contribution to Business Practice

This case study contributes to business practice by considering outdated methods of force management. In federal employment, SP includes force management practices, a numbers-focused process for managing the finite quantity of the workforce (Wright, 2012). However, given the state of the economy, limited funding of the NG, and the number of retirement eligible federal employees, the concept of SP proves essential (Asch, Mattock, & Hosek, 2014). Therefore, SP is concerned with identifying positions that are critical to success and choosing the best way to satisfy future requirements, and developing strategies to determine the optimum mix of internal and external recruitment (Cannon & McGee, 2011). The intent of this study was to understand the importance leadership places on SP as part of the WMD strategic plan. A compelling argument in building a strategic plan is to educate WMD leadership on the importance of SP and the impact it has on employee retention.

Implications for Social Change

This study may contribute to social change by asserting the value of NG assets as community partners. Since 2005, the military force has found favor with the American public (Lowenberg, 2005). The value of the NG increases when a natural disaster or emergency event happens (Yoder, 2013). Three main elements, domestic support missions, overseas defense missions, and the ability to do both missions cost-effectively; prove the great value of the NG for the United States (McKinley, 2010). The NG provides a unique force directly connected with local communities (SAC, 2012). The loss of corporate knowledge in an already shorthanded workforce presents an argument for developing succession plans built to impact employee retention. Engaging WMD leadership and developing strategic plans incorporating SP affords continuity of the workforce. When employees have clear career paths, employee retention improves.

A Review of the Professional and Academic Literature

The purpose of this qualitative case study was to explore SP strategies used by ANG leaders to retain skilled workers. According to Ganu and Boateng (2012), SP is a process whereby a business owner plans for the transfer of knowledge, skills, labor, management, control, and ownership of an enterprise to the next generation. Additionally, succession planners focus on the needs of the entity as senior leadership ages or retires, SP helps to prepare for unexpected interruptions of key leadership roles, and it ensures the organization has the right people in place to function at peak efficiency (Ganu & Boateng, 2012).

Professional research databases I used primarily in this research included EbscoHost, Emerald Insight, Google Scholar and ProQuest. Terms used during database searches included: *strategy, succession, planning, employee retention*, and *generations in the workplace.* The case study consisted of 179 total sources from books, professional journals, and industry articles; of these, 158 were peer reviewed articles (87%) dated within the past 5 years. The literature review included 155 references, 127 of which were peer reviewed (86%) and dated from 2012 to 2015, and nine references older than 5 years (8%). The review included peer-reviewed articles, dissertations, and varied succession theories ranging in focus on human capital (Balsmeier, Buchwald, & Zimmermann, 2013). The broader concept of SP includes: (a) identifying organizational needs (Fibuch & Van Way, 2012); (b) small business (Lussier & Sonfield, 2012); (c) organizational culture (Shen, 2011); (d) legal implications (Cook & Sobieski, 2013); (e) organizational branding (Alter, 2013); (f) generations in the workplace (Gursoy, Chi, & Karadag, 2013); (g) human resource systems (Al-Dmour & Al-Zu'bi, 2014); (h) performance management (Cavanaugh, 2013); (i) training and development (Long & Perumal, 2014); (j) performance reviews (Martin, 2013); (k) hiring and onboarding (Dwoskin, Squire, & Patullo, 2013); (l) candidate selection (Woods, Johanson, & Sciarini, 2012); and (m) employee retention (Oladapo, 2014).

The following academic literature review includes ten categories of research related to SP and includes: (a) organizational leadership theory, (b) SP, (c) organizational culture and structure, (d) legal implication, (e) organizational branding, (f) generations in the workplace, (g) human resource systems, (h) candidate selection, (i) management and leadership, and (j) employee retention. I used succession theory, leadership theory, and employee retention as a framework to research SP.

Organizational Leadership Theory

According to organizational leadership succession theory, building collaborative partnerships assists systems in the planning and management of succession (Zepeda et al., 2012). Leadership model succession theory is the conceptual framework guiding this study. Bass (2009) posited new transformational leadership adapts SP to meet organizational long-term goals. Transformational leadership is a method of leadership involving three behaviors: (a) inspirational motivation; (b) individualized consideration; and (c) intellectual stimulation (Gundersen, Hellesoy, & Raeder, 2012). Transformational leaders are successful through engaging subordinates in shared exchange processes based on interpersonal trust, common loyalty, and long-term reciprocity with supervisors (Tse, Huange, & Lam, 2013). Transformational leadership is evident when empowering leaders to influence followers' engagement at work (Breevaart et al., 2013). Individual resources and work engagement may be critical in explaining the transformational leadership performance link, considering a positive link between work engagement and performance (Hayati, Charkhabi, & Naami, 2014). Hayati et al. (2014) emphasized transformational leaders conveyed their enthusiasm and inspiration to their subordinates by way of modeling. Transformational leadership occurs when organizational interest exceeds employees' self-interest by introducing social exchange between the organization and employees to lessen turnover intention and behavior (Tse, 2013). Situational conditions affect the managers and leaders who influence the (a) environment of an organization, (b) the immediate team, (c) the task and technology, (d) stress, (e) physical distance, (f) closeness, (g) transfer of leadership and (i) executive succession (Bass & Bass, 2009). Authority is power to legitimize tradition, law, agreement, religion, and rights of succession (Bass & Bass, 2009). Leaders must inject leadership while being an instrumental factor resolving problems, leadership is a product of succession of the previous leadership situations that molded the leader (Bass & Bass, 2009). SP is part of the human capital system resulting in employee retention. Successors are an important stakeholder group in the succession process, and are the key to effective succession is to find an optimal blend of well- timed mentoring (Wang et al., 2004). Four essential factors of succession are planning include: (a) successor development, (b) predecessors influence, (c) intergenerational relationships, and (d) management advice (Wang et al., 2004).

Human resource information systems (HRIS) assist human resources personnel to manage employee development, performance appraisals, compensation, and recruitment and selection (Al-Dmour & Al-Zu'bi, 2014). Several theories provide fundamental arguments for succession, for instance, agency theory, human capital theory, transaction cost approach, and resource dependence (Balsmeier, Buchwald, & Zimmermann, 2013). Agency theory addresses incentives to monitor stakeholder interest, human capital or social capital captures the leader's experience and expertise, while transaction cost equates to strategic decisions and transactions of fundamental importance (Balsmeier, Buchwald, & Zimmermann, 2013). Drawing from social exchange theory, the leader member exchange and affective commitment (AC) are proposed as supervisor-based and organization-based social exchange mechanisms respectively, exemplifying how social exchange processes occur between an employee and the supervisor, and between the employee and the organization as a whole to underpin the effect of transformational leadership on turnover outcomes (Tse et al., 2013).

Succession Planning

SP is different from replacement planning, because succession focuses on forecasting organizational needs and developing the internal workforce for leadership roles (Fibuch & Van Way, 2012). SP is not just planning how to fill management positions succession should be a comprehensive organizational key strategic process for every critical position in the organization (Fibuch & Van Way, 2012). In many organizations based in developed markets, half of senior leaders are eligible for retirement by 2016, and most do not have a successor ready or able to fill the vacant position (Fernandez-Araoz, 2014). Leaders need to develop a succession plans when building organizational infrastructure (LaManna, 2012). Succession plans include timelines and: (a) a vision specific to the business; (b) values and guiding principles; (c) short and long-term goals; (d) personal goals and retirement plans; (e) stakeholders; (f) successor criteria; and (g) intended legacy for the organization (LaManna, 2012).

Identifying and nurturing talent for leadership roles is an essential part of strategic SP (Shaik, 2013). Effective SP is the core of leadership development and an essential business strategy enhancing the ability to achieve orderly transitions and maintain productivity levels (Kim, 2012). SP begins with management positions, and an effective strategic succession plan must address the need for critical continuity and individual development of key people in the professional, technical, sales, and production within the organization (Shaik, 2013). The concept of organizational succession broadens the scope of succession from positional to organizational. Organizational succession considers employee engagement and provides a career ladder (Gray, 2014). SP requires more than the transition of ownership businesses must prepare to develop and replace employees, and anticipate transition (Simoneaux, & Stroud, 2014). While the term *succession plannin*g remains in the lexicon, *continuity planning* is a better descriptor, framing ongoing and refocused relevance during the journey from now to a new state (Walker, 2013).

There are three considerations in the valuation of human capital including position, contribution and response all three provided indicators of succession (Walker, & Forbes, 2014). The new phase of SP includes talent management or processes for talent absorption, retention and development of employees (Ahmadi, Ahmadi, & Abbaspalangi, 2012). Successful SP includes leadership programs, mentoring programs, special projects and assignments for top performing employees (Galbraith, Smith, & Walker, 2012). Proactive SP includes communication of opportunities, inventory of organizational talent, and development of organizational talent (Flynn, 2014). There are positive significant relationships between SP, management development and ethical climate (Nieh & McLean, 2011). SP includes talent pool cultivation, career health monitoring, holistic assessment, directed skills enhancement and adaptability (Shamsuddin, Chee-Ming, Wahab, & Angzzas Sari, 2012). The relationship between SP and strategic planning show a significant correlation between assessment of organizational talents, competent personnel, existing skills, and determination of skills required for the future (Darvish & Zahra Najafi, 2014). Taking a holistic approach to the SP process provides clients with the most value for their business, minimizes their tax burdens, and allows them to control the process (Hall & Hagen, 2014).

Succession Across Industries

Succession across industries namely small business provides samples of behavior scalable to any size of organization. Small business is the most prevalent form or business organizations accounting for 70% of all companies in European countries (Wang, et al., 2004). Wang et al (2004) stressed an important link between succession issues and organizational performance of small businesses in the UK. A variety of factors influencing SP in family businesses were studied including culture, continuity planning, and employee development (Lussier & Sonfield, 2012). Lussier and Sonfield claimed that the degree of SP by family businesses varies significantly by country (Lussier & Sonfield, 2012). Family businesses play an important role in economies; effective family succession includes personality systems, ownership systems, family systems, and management systems (Baur, 2013). Baur declared personal fit in the family business, owner-managed structure, familial communication, and ability to out-perform competitors directly contribute to effective SP (Baur, 2013). Nothing ever stays the same in business or life; organizations evolve with SP (Tierney, 2013). Succession is not for future generations to manage but for the present to manage for them (Gill, 2013). Actual application of succession plans loses out to more immediate business concerns (Amato, 2013). Digitalization of business assets has created a new challenge for development of succession plans for small business resulting in perishable and irreversible damage (Hopkins, Lipin, & Whitham, 2014). The future of a community links to the development of small business units (Scales, 2014). There are many issues with SP, including a leadership deficit, ensuring continuity of organizational planning, and documenting tacit knowledge (Elkin, Smith, & Zhang, 2012). Projecting leadership attrition and delegation of duties, reduces stress and conflict, and strengthens leadership continuity through SP (Elkin, Smith, & Zhang, 2012). Top executives with strong personal ties with a CEO leaving for routine verses dismissal is a potential perception influencing the successor to the organization (Hilger, Richter, & Schäffer, 2013). Minimal attention on how succession could include a systemic analysis of entrepreneurial opportunities, underlining the need to focus on ownership transition rather than management succession (Nordqvist, Wennberg, Bau, & Hellerstedt, 2013). Succession challenges include managerial, organizational, cultural, legal, educational and cost (Tabatabaee, Lakeh, & Tadi, 2014).

Organizational Culture and Structure

Succession planning links to organizational culture, employee retention and branding. The ability to cultivate organizational culture through SP initiatives includes recruitment, training, development, performance management, and retention are crucial to organizational success (Crumpacker & Crumpacker, 2007). Managing human capital begins with establishing performance management tools aligned with organizational strategy. Human capital is a combination of skills, knowledge, and experience possessed by an individual, of value, or cost to the organization (Green & Roberts, 2012). Culture, environmental factors, definition of roles and responsibilities, communication, and vague accountability are the most often cited reason for employee turnover (Shen, 2011). The task of managing human capital requires the effective use of a Human Resource Systems (HRS). Leaders determine how succession influences the cultural contexts in the workplace (Renihan, 2012). School leaders in Maryland adopted a succession plan similar to PepsiCo linking to five succession-related practices, including: (a) identification; (b) development; (c) promotion; (d) movement; and (e) retention (Renihan, 2012). Building an employee centric organizational culture leads to employee investment and improved performance through organizational citizen behaviors.

Organizational citizenship behaviors (OCB) are work behaviors beyond requirements and contribute to the social context of performance (Tillman, Lawrence, & Daspit, 2014). The five dimensions of OCB are altruism, conscientiousness, sportsmanship, courtesy, and civic virtue (Zehir, Muceldili, Altindag, Şehitoglu, & Zehir, 2014). If human capital trust the leader, variation or change is easier. An individual's willingness, ability to embrace variations from normal activities, and amount of time to accomplish tasks among peers improves performance (Tillman, Lawrence, & Daspit, 2014). Likewise, when employees engage in helping behaviors the sense of belonging increases building employee loyalty (Tillman, Lawrence, & Daspit, 2014). Todays' organizational climate range from ethical to unethical as identified by many examples of corporate scandals, there is a strong relationship between leadership, OCB, and ethical climate (Zehir et al., 2014).

Legal Implications

Maximizing diverse demographic SP integrated with leadership development improves organizational culture (Etti, 2014). Establishing a diverse anti-discriminatory workplace originally began in the early sixties. The evolution of affirmative action began with Title VII of the Civil Rights Act of 1964; an employer cannot fail to refuse to hire or to discharge any individual because of race, color, religion, sex, or national origin (Cook & Sobieski, 2013). Affirmative action plans provide insight to workplace trending and opportunity. Organizational leaders should consider SP of the internal workforce to shape the future. Both affirmative action and SP require analysis of people and skill sets (Moore, 2012). According to Moore, the constitution and title VII explicitly prohibits racial preferences, Title VII permits a race conscious workplace. The principles of equal opportunity establish a culture and structure for the future. The human resources (HR) field has evolved out of labor tensions between employer and employee, to ensuring legal compliance, resulting in development of knowledge of employment staffing, recruitment, training, compensation, and benefits (Maugans, 2015). Leveraging an HRIS enables organizational leadership the tools to build diverse succession plans, track employee development, mange performance appraisals, ensure compensation equity, improve recruitment and audit selection processes.

In the 21st century, work tends to span organizational boundaries and take place in networks (Swart, & Kinnie, 2014). Swart and Kinnie (2014) asserted linking human resource management (HRM) systems to organizational values, illustrates awareness of opportunity to join organization and employee. HR professionals implement process designed to meet the needs of organizations in context of regulatory framework (Bodie, 2013). The Roberts Court recognized labor law concerns concerning employment discrimination, employment, and benefits (Bodie, 2013). Bodie (2013) affirmed internal enforcement by HR and compliance departments supports HR compliance. In 2012, a significant concern was the distinct legal right and highly personal wrong standards (Czubkowski, 2013). The highly-personal-wrong is broad and does not provide useful distinction in employment discrimination claims (Czubkowski, 2013). Elgen and Litwin (2014) stated the option of dispute resolution systems (DRS) provide a relationship model of organizational justice, and perceived legal compliance. Employment relations measures provide data and should be included in the HR strategy (Elgen & Litwin, 2014). Human Resource Management (HRM) practitioners and key organizational decision makers should consider formal systems and informal messages in HR systems (Jisung, Soo-Young, Sangmin, & Se-Ri, 2015). The human capital model (HCM) relates to investments in an individual employee’s value to the workforce (Mani, 2013). Formal schooling, training, and experience are factors influencing a HCM investment (Mani, 2013). Mentoring and succession pans can facilitate employee investment decision (Mani, 2013).

Organizational Branding

A purpose of SP is to create a talent rich organization (Gray, 2014). Marketing an organization to appeal across multiple generations begins with the strength of the organizations brand. The organizational brand influences how society associates a product with social status, economical status, and identity. Personalizing marketing is about making sure the brand and its marketing are as relevant as possible to as many customers as possible (Kotler 2012). Branding differs from agency to agency; an electronic corporate approach delineates an internal or external focus. According to Alter, having the right people doing the right things is a critical element to a company’s ability to be successful (Alter, 2013). The organizational culture of grooming your internal assets builds on the concept of employee retention. Employee retention is critical to the long-term health and success of the business (Mishra, 2010). With the collapse of employee loyalty in the workforce, career paths, or SP, move to the center of employee retention strategies (Croteau & Wolk, 2010). Electronic employee screening and selection present both legal and ethical implications. In 2013, one of two major concerns facing employers who use internet searches to screen applicant was the potential for a claim of discrimination (Parez, Silva, Harvey, & Bosco, 2013). The ANG predominately uses an internal recruitment focus capitalizing on employee retention. However, recruiting externally assures screening all qualified candidates using a unified electronic process. Electronic screening and selection measures must properly adhere to existing anti-discrimination laws. These practices align with organizational strategy as an equal opportunity employer.

The age diverse workforce expands the definition of diversity, and employers who develop strategies that appeal to an age-diverse population remain competitive (Kapoor & Solomon, 2011). Firms need diverse social networks among their executives (Munyon, Summers, Buckley, Ranft, & Ferris, 2010). A transparent organizational succession plan supports the social construct when visible to employees. While there are ethical considerations, a transparent succession plan assisted organizational leadership in maintaining corporate continuity. In 2015, employee turnover was (or remained) a continuous organizational risk adversely affecting corporate continuity. Barron et al. (2011) emphasized three distinct types of turnover: outsider succession, follower succession, and contender succession. The ANG might benefit from developing additional transparent SP. Sharing a succession plan with an employee directly affects employee retention by aligning strategy and diversity.

Generations

The term *generation* refers to individuals born in the same general time span (Gursoy et al., 2013). Most represented in the workplace are; Baby Boomers (born 1946-1964), Generation X (born 1965-1980), Generation Y (born 1981-2000), with Baby Boomers and Generation X'ers representing the two largest groups (Gursoy et al., 2013). Four generations in the workplace present both challenges and opportunities for human resource professionals and organizational leaders. Employees from all generations hold different values, morals, dreams, desires, ambitions and styles of working (Bennett, Pitt, & Price, 2012). Bennett et al. (2012) argued as the crucial generational transition occurs management must manage consciously and willingly to avoid the conflict of talents. Technology, in particular, gave way to a broader gap between older and younger generations (Roebuck, Smith, & Haddaoui, 2013). Gen X and Gen Y view workplace boundaries much differently than Baby Boomers valuing efficiency over face time (Roebuck et al., 2013). For employers to achieve the benefits of employee engagement, management must understand the drivers that increase engagement (Schullery, 2013). Engagement of the younger generations is crucial for employees who wish to gain and retain the best and the brightest (Schullery, 2013). Analysis indicated Gen Y tend toward situational (high idealism and high relativism) and the socially connected orientations are more collaborative verses unilateral (VanMeter, Grisaffe, Chonko, & Roberts, 2013). Supervisors of Gen Y must seek ways to help nurture and develop ethical standards consistent with values held by organizational leaders (VanMeter et al., 2013).

The authors found generational differences with respect to the ways values affected the relationships between fulfillment of work factors and attitudinal outcomes (Mencl & Lester, 2014). The differences were most evident with respect to career advancement, training and development, and involvement in the decision-making processes (Mencl & Lester, 2014). Employees who have constructive and satisfying relationships in the workplace and who trust the organization seem to be a prerequisite for efficiently functioning organizations (Wohrle, Van Oudenhoven, Otten, & Van der Zee, 2015). Trust in the workplace is a highly relevant component of employees' functioning (Wohrle et al., 2015). Promoting employee intention to remain employed requires a multifaceted approach to influence retention (Tourangeau, Thomson, Cummings, & Cranley, 2013). The most frequently selected incentives across all generations were having a reasonable workload and having manageable nurse-patient ratios (Tourangeau et al., 2013). The challenge managers' face is to manage employees from different backgrounds effectively and to understand the many different individual needs that stem from gender, generation and culture (Yi, Ribbens, Fu, & Cheng, 2015). Managers need to focus attention on how to effectively manage and motivate younger generations (Yi et al., 2015).

Researchers provided convincing evidence of changes in extrinsic work values, leisure, work centrality and social work values (Lyons & Kuron, 2014). Generations place increasing priority on work-life balance, both attitudinally and behaviorally (Lyons & Kuron, 2014). The generational trends evident suggest workers are becoming move independent and self-focused and less committed to their organizations and as a result are more mobile in their careers (Lyons & Kuron, 2014). Generation Y is emulating Generation X's frequent employment change pattern (Laird, Harvey, & Lancaster, 2015). Generation Y is twice as likely as Generation X and three times as likely as Baby Boomers to consider leaving a job within 1 year (Laird et al., 2015). By examining career mobility patterns of four generations, career differences do not follow linear patterns (Lyons, Schweitzer, & Ng, 2014). Lyons et al. (2014) assessed if we are in the midst of an inter-generational shift in career patterns, the results provided evidence of increased job and organizational mobility across generations.

Succession planning is essential to remain competitive as the oldest of the Baby Boomer generation turn 65 years old in 2012 (Appelbaum et al., 2012). Retirement of the baby boomer generation led to skill shortages in the United States (Neumark, Johnson, & Mejia, 2013). An estimated 20% of the 150.9 million jobs in the United States require replenishing due to Baby Boomers exiting the workforce (U. S. Bureau of Labor Statistics, 2012). Leaders provide daily contributions to operations of government and need strategies to sustain consistent performance throughout the organization when baby boomers retire (Pollack, 2012). Baby boomers are loyal to organizations when offered flexible options as retirement approaches (Gursoy et al., 2013). Baby Boomers equal 44% of the United States of America workforce and have sacrificed and worked hard for success (Gursoy et al., 2013). Managers should retain older workers and avoid assuming investing in the training of older workers yields a poor return on investment (Gursoy et al., 2013). Administrators should garner the knowledge of each Baby Boomer, by communicating unwritten practices, developing internal strategies to identify knowledge gaps, and identifying who should reduce gaps with business solutions (Meriac et al., 2010). Baby boomers and Generation X agree with a controlled management approach and value working individually (Brack, 2012). Generation X possesses specialized skills, denounces the status quo, and values work-life balance (Gursoy et al., 2013). Gursoy et al. (2013) posited a combination of societal, demographic, and carbon forces have lasting implications for how, why, when, and where individuals work in the future. HR managers face challenges with innovation and intergenerational cohesion (Gursoy et al., 2013). The younger generational employees have a reduced work commitment (Park & Gursoy, 2012). Younger employees are less likely to allocate personal resources to work tasks as they place higher value on work-life balance and personal life (Park & Gursoy, 2012). Generation X and Millennials oppose working 8AM to 5PM workweeks, and studies show both generations require guidance and advice (Gursoy et al., 2013). Leaders should include the younger generation preferences and values into HR policies to keep Millennials (Park & Gursoy, 2012). Millennials and Generation X believe in definite separation of work and personal life (Gursoy et al., 2013). Generation Y, or Millennials, are the largest population sample in the United States (Doherty, 2013).

Human Resource Systems

Organizational succession or SP includes retaining talent, managing healthy organizational culture, and strategic planning (Sims, 2014). Building the internal bench reinforces the employee’s investment and loyalty to the organization. Most organizations with a talent bench strength strategy are able to achieve results by increasing retention of top talent, reducing external recruiting costs, and reducing time-to-fill open leadership positions (Sims, 2014). Building a healthy organizational culture requires a multi-faceted human resource system. HRIS assist human resources to manage employee development, performance appraisals, compensation, and recruitment and selection (Al-Dmour & Al-Zu'bi, 2014). The HR systems differ across employee groups in the efficacy of high-involvement HR and internal labor markets (ILM) systems (Krausert, 2014). The ILM systems are most effective when employees require firm-specific skills and networks to perform their job (Krausert, 2014). High-involvement HR is successful when supervisors evaluate and incentivize performance in relation to performance output (Krausert, 2014). An effective human resource or talent management system includes investment (development and training) and assessment (performance reviews).

Training and development programs build organizational culture. Perhaps more investment is necessary in the area of diversity training and sensitivity to the unique contingencies (Dworkin et al., 2013). SP includes strategies used to establish a culture inclusive of diversity. More specifically, training focus may affect trainees’ affective outcomes by influencing their confidence in their ability to interact with diverse others as well as their attitudes toward diversity (Holladay & Quiñones, 2008). Traditional hierarchical structures change through affirmative action and SP. SP may be a key element in dealing with culture problems associated with leader succession (Valentine, 2012).

Organizational leaders use a performance review system to identify talent pools within an organization. The intent of performance feedback is to improve the target behavior(s) measured by the observer (Cavanaugh, 2013). Regardless what type of industry, adequately measured performance enables organizational leadership with a tool to measure both people and production. The 360 method of performance review provides data more effectively when considering SP. The 360-performance review is systematic collection of performance data on an individual or group, derived from a number of stakeholders on their performance (Akhtar, Nath, & Kalita, 2014). The 360-performance appraisal affords a multilevel approach to solicit feedback. When used effectively the 360 method captures variances within an organizational structure. Some weaknesses are the process is much more time-consuming, somewhat subjective, and can vary between stakeholders. The 360 method is similar to the Scorecard method because both tools target performance indicators. Likewise, the scorecard method uses chosen performance indicators, available degree of information, and indicators of performance (Martin, 2013). Scoring an individual requires predetermined definitive metrics aligned with organizational objectives. This method reduces subjective measurements or assessments. The Scorecard and 360 approach differ significantly in method, effectively a scorecard measures production versus feedback. However, both the 360 and Scorecard method provide organizational leadership with an assessment of performance. For the ANG, the 360-method measures leadership performance. Unfortunately, within the Department of Defense (DOD) we do not have a pay for performance mechanism aligned with the performance appraisal process. However, affording leaders higher wages as they take command of organizations is a form of compensation.

Employee Development and Training

Training and development programs support healthy organizational culture. More specifically, training focus may affect trainees' affective outcomes by influencing confidence in ability to interact effectively as well as shape attitudes toward diversity (Holladay & Quiñones, 2008). Training is increasingly vital to the modern organizations success (Long, 2014). Training forms the backbone of strategy implementation through having a dedicated training program that pays a central role to nurture and strengthen competencies (Long, 2014). Making sure the right people are in place with the prerequisite training and experience to assume leadership positions is a vital part of strategic planning and talent management (Hall-Ellis & Grealy, 2013). Leaders sharing experiences provide additional opportunity for learning (Thomas & Kamalanabhan, 2012). The employee's training and learning throughout a career supports personal growth positively contributing to organizations change (Hall-Ellis & Grealy, 2013). The Dreyfus model of skill acquisition framework suggests mentoring, coaching, and staff development, empower movement up organizational career ladders (Hall-Ellis & Grealy, 2013). Organizational leaders should establish mentoring programs to determine goals, share ideas, and be open to continuous feedback from mentors (Craig, Allen, Reid, Riemenschneider, & Armstrong, 2012).

Management benefits from the significance of knowledge transfer to prevent loss of knowledge through attrition (Durst & Wilhelm, 2012). Knowledge management assigns activities such as selection, development and training, documentation and SP (Durst & Wilhelm, 2012). Knowledge management generates value from intellectual and knowledge-based assets (Williams & Schaefer, 2013). Generating value from assets includes organizing what employees know, and sharing that information among employees and departments in an effort to develop best practices (Williams & Schaefer, 2013). Leaders need to understand how to increase knowledge-sharing (Hau et al., 2013). Shared knowledge occurs when an individual provides intellectual stimuli to another individual and an intellectual response is the result (Horaguchi, 2014). The knowledge transfer process includes employment, mentoring and shadowing, and development of a knowledge management system (Winship, 2012). Individuals gain new resources and broaden their control through enhancing their skills through development programs (Parker, Johnson, Collins, & Nguyen, 2013). Employees cannot sustain the pace of doing more with less (Hagel, 2013). Leaders should provide insight into the development and need for knowledge management principles (Andreeva & Kianto, 2012). Organizational culture may complicate implementing knowledge management practices within an organization (Connell, 2013). Leaders must provide the time and training to facilitate the knowledge sharing process (Connell, 2013). Individual and group training, providing job aids, with current procedures and samples, to assist employees in daily activities, enhance knowledge sharing (Connell, 2013). Implementing knowledge sharing processes may produce benefits throughout government and non-government entities (Connell, 2013).

Performance Reviews

Managers can use a performance review system to identify talent pools within an organization. The intent of performance feedback is to improve the target behavior(s) measured by the observer (Cavanaugh, 2013). Regardless the industry, adequately measured performance enables organizational leadership with a tool to measure both people and production. The 360-performance review is systematic collection of performance data on an individual or group, derived from a number of stakeholders on their performance (Akhtar, Nath, & Kalita, 2014). The 360-performance appraisal affords a multilevel approach to solicit feedback. When used effectively, the 360 method captures variances within an organizational structure. Some weaknesses are the process is much more time-consuming, somewhat subjective, and can vary between stakeholders. The 360 method is similar to the Scorecard method because both tools target performance indicators. Depending on the organizational weighting, a business leader may use both methods for completely different purposes. Likewise, the scorecard method uses chosen performance indicators, available degree of information, and indicators of performance (Martin, 2013). Scoring an individual requires predetermined definitive metrics aligned with organizational objectives. This method reduces subjective measurements or assessments. The Scorecard and 360 approach differ significantly in method, effectively a scorecard measures production versus feedback.

Hiring and Onboarding

The first step in the hiring process is to identify the vacant positions and to ensure an adequate job description exists (Dwoskin et al., 2013). Job descriptions provide essential job elements and focus to employee screening. Well-written job descriptions provide HR with a clear understanding of the ideal candidate skills. Likewise, when a candidate understands the job clearly and the candidate skills match the job, employee satisfaction improves and the employee remains a part of the organization. Management builds the foundation for organizational succession when they ethically conduct interviews, invest in employee development, incorporate performance management and align job descriptions. Interviewing is a critical part of the hiring process, and is crucial to understand what questions are permissible (Dwoskin et al., 2013). Training is essential to the success of interview instruments to ensure legal compliance and screening the candidate for job factors essential to performance. Realistic interviews provide a window of visibility into the organization. Candidates who connect with the organization, as early as the interview or screening process may tend to draw on that experience when considering other potential career opportunities. According to Woods et al., (2012), selection practices have to be reliable and valid. A reliable selection process coupled with valid selection tools result in consistent qualified candidates.

Social media plays an essential role in the hiring process in today's society. Although using social media sites reference ethical considerations social media is here to stay (Parez et al., 2013). HR professionals identified an opportunity for social networking to enhance employee engagement, employee satisfaction and employee retention (Parez et al., 2013). Perhaps more investment in the area of training and sensitivity to the unique contingencies benefit the organization (Dwoskin et al., 2013). The succession process begins with the selection and screening of quality candidates; however, employee retention must also be part of the organizational strategy.

Candidate Selection

In an era of fiscal constraints, the importance of organizational engagement with candidates throughout the recruiting process remains a crucial component. Organizational branding attracts candidates based on cultural values at the onset of the recruiting process. The interview, job descriptions, and employee development affect employee turnover and succession. SP must comply with all legal and ethical mandates within the workforce. Unfortunately, legal adherence with Equal Employment Opportunity (EEO), Civil Rights Act, and Anti-Discrimination laws may intimate leaders. Leaders must consider the holistic approach to SP begins with hiring a candidate, development, which lead to advancement. The strategic HR partner provides oversight of interviews, employee development, performance management and job descriptions. Interviewing is a critical part of the hiring process, and crucial to understand what questions are permissible (Dwoskin et al., 2013). Training is essential to the success of interview instruments to ensure legal compliance and screening the candidate for job factors essential to performance. Realistic interviews provide a window of visibility into the organization. Candidates who connect with the organization even as early as the interview or screening process may tend to draw on that experience when considering other potential career opportunities. Comprehensive recruitment, selection, extensive training, and development were associated with decreased rate of employee turnover and higher levels of productivity and profitability (Armstrong et al., 2010). The first step in the hiring process is to identify a fillable position and to ensure that an adequate job description exists (Dwoskin et al., 2013). Job descriptions provide essential job elements and focus to employee screening. Well-written job descriptions provide HR with a clear understanding of the ideal candidate skills. Likewise, when a candidate understands the job clearly, they are likely to be remain a part of the organization.

According to Woods et al. (2012), selection practices have to be reliable and valid. A reliable selection process coupled with valid selection tools result in consistent qualified candidates. The succession process begins with the selection and screening of quality candidates; however, employee retention must also be part of organizational strategy. Building the internal bench reinforces the employee's investment and loyalty to the organization. Most organizations with a talent bench strength strategy increase retention of top talent (Sims, 2014). Organziational succession considers employee engagement and provides a career ladder (Gray, 2014). Providing candidates with a plan for continued success directly affects employee turnover. A turnover argument begins by selecting the right leadership or management and shaping the organizational culture. Essentially human resource (HR) managers anticipate human capital to overcome employees' turnover intention (Long & Perumal, 2014). The partnership between hiring managers and HR professionals should align with organizational strategy. Incorporating HR as a strategic partner mitigates legal concerns and unfair labor practices from becoming the organizational culture.

Management and Leadership

Biron and Boon (2013) asserted employee turnover takes a heavy toll, increasing costs both directly (recruitment, selection training) and indirectly (lost knowledge and reduced productivity). The leader-member exchange supporting the social exchange context of work referring to an individual's exchange relationships with colleagues and supervisors may relate to turnover (Biron & Boon, 2013). Leadership create a transparent, integrated approach of succession management and leadership development through articulating opportunities, expectations, and self-improvement opportunities in existing roles (Jantti & Greenhalgh, 2012). Successful managers must provide reasoned options consistent with established metrics and program assessment standards (Winchell, 2013). Poor individual and firm performance significantly increases the likelihood of executive dismissal (Hilger, Mankel, & Richter, 2013). Senior leaders in underperforming industries continue to reduce executives' wages or aggressively remove the chief executive officer (Gao, Harford, & Li, 2012). Administrators reduce benefits or force turnover to penalize poorly performing executives when employing strong government structures (Gao et al., 2012). Leaders leaving organizations without a succession plan jeopardize projects and disrupt business continuity (Ganu & Boateng, 2012). Leadership transition affects firm performance in emerging economies, and alignment between successor origin and social context improve firm performance (Chung & Luo, 2013). Likewise, outside successors enhance firm profitability because of the large-scale and rapid changes in emerging markets (Chung & Luo, 2013). An appointed successor has both the capacity and the motive to challenge the organization (Kokkonen & Sundell, 2014). Impact factors associated with intimidation and avoiding others have a significant relationship with employee engagement, job satisfaction, and burnout. Dysfunctional dispositions may produce significant behaviors in leaders that influence an employee's ability to function in an organization and jeopardize organizational success (Leary et al., 2013).

Regardless the industry, for-profit, public, and nonprofit sectors succession-based efforts aligning with strategic plans enhance comprehensive succession management

(Gothard & Austin, 2014). Planning for uncertainty is essential to organizational success, firms need to plan for fraud, executive succession, and risk management to prepare for the future (Lewis, 2015). The four major phases of internal succession include evaluation, obtaining talent, development of talent and proper financial arrangements (Sinkin & Putney, 2015).

Organizations should create a program to develop future leaders from their internal talent by creating a leadership development programs (Miodonski & Hines, 2013). Leadership development can include several components including combinations of off-site training, 360-feedback, instruments filled out by individual participants, executive coaching, mentoring, real-world problem solving, and plans for application of knowledge (Coloma, Gibson, & Packard, 2012). Ongoing leadership development for all staff groups is an essential component of SP positioned to meet future organizational challenges (Keenan et al., 2014). SP is part of the leadership role including the succession process and the succession decision (Whaley & Walker, 2014). Administrators should allow the next generation of leaders to foster economic value, and create positive social change (Ganu & Boateng, 2012). Raising awareness regarding the risks related to the large number of baby boomers exiting the workforce and exploring the principles and insights of hidden abilities for organizational sustainment could generate positive social change (Ganu & Boateng, 2012).

Organizational downsizing is a dynamic factor between changes in work conditions and employees' responses to the changes (Boyd, Tuckey, & Winefield, 2014). Workforce downsizing is the intentional reduction in the number of people of an organization accomplished through hiring freezes, attrition, and layoffs (Brauer, & Laamanen, 2014). Boyd et al. (2014) affirmed organizational downsizing reflecting the global financial pressure has an adverse effect on wellbeing and motivation of employees. Workforce downsizing including number of jobs, job occupancy due to redefinition of position and disruption of relationship network, represents the most common occurring shock to organizational routine and performance (Brauer & Laamanen, 2014). Downsizing generates profound implications and organizational consequences (Hansson, 2015). Defining if organizational downsizing is a process or a strategy is essential, if a strategic downsizing leads to improved performance, downsizing is a strategy; however, if downsizing is a process then a series of actions should lead to improved performance (Hansson, 2015). Likewise, management must mitigate the effects of downsizing caused when retained employees lack the necessary knowledge, skills, and ability to fill positions (Hansson, 2015). As a process, restructuring focuses on identification of team roles and positions, leadership, education, training, trials, and data collection (Prince, Hines, Po-Huang, & Heegeman, 2014).

Employee Retention

To understand employee retention, leaders must consider the factors, which contribute to employee attrition and turnover. Both new and retirement eligible employees are two groups with the highest turnover rates (Cho & Lewis, 2012). Employees leave agencies because their current employment proposition-tangibles (pay and benefits) and intangibles (supervisor, relationship, work-life balance, work content, career path, and trust in senior management) are unsatisfactory (Oladapo, 2014). While a number of factors that affect the retention rates of valued employees, the most important factor is the way an organization and HR administers its talent management program (Oladapo, 2014). The scope of talent management falls into five major categories: recruitment, performance management, SP, training and development, and retention (Oladapo, 2014). Effective retention practices start with good hiring practices of qualified and motivated people (Oladapo, 2014). Managing organizational talent starts with the decision to hire, and continues throughout the lifecycle of the employee for their duration of employment at the organization. Organizational leaders must identify top talent positions, and internal high-potential individuals to groom to fill those positions when they become available (Kello, 2014). The concept of building a bench of talent reinforces the investment in the employee. There is no promise the high-potentials will become the next vice president (VP); instead identification ensures employees know the company leadership sees the employee's effort as high potential, and invests in the employee's future with the company (Kello, 2014). Employee retention within an employee's lifecycle influences the employee's sense of investment in the organization and the health of the work environment.

A healthy work environment directly affects employee retention (Gothard & Austin, 2014). Incentives vary by generational value systems. Incentives affecting social atmosphere, career incentives, and changes in a leadership style have to attract attention of managers (Korsakiene, Stankeviciene, Simelyte, & Talackiene, 2014). Good interrelationships with co-workers, the opportunity to maintain life-work balance and competitive financial rewards are the most significant factors influencing employee satisfaction (Korsakiene et al., 2014). Research suggested talent management, building a bench of high-potential talent, and maintaining a healthy work environment affects employee retention. To build effective leadership succession plans, executives need to know more about manager's satisfaction with current roles and understand employee career plans (Warshawsky & Havens, 2014).

Providing candidates with a plan for continued success directly affects employee turnover. A turnover argument begins by selecting the right leadership or management and shaping the organizational culture. The importance rises for HR managers to overcome employees' turnover intention (Long & Perumal, 2014). Proactive organizations are aware of mission-critical positions and performance and anticipate turnover (Kello, 2014). Effective organizational SP may identify gaps of eligible internal candidates and the need to consider external candidates. An outside candidate brings fresh knowledge and perspectives to the company (Karevli, 2012). Should the succession plan identify a candidate or skill gap, an external candidate may be the solution. Karevli argued external top managers are less concerned with internal political relationships and face fewer obstacles in decision-making needed for growth and implementing timely, crucial, strategic changes (Karevli, 2012).

Using a wide range of talent practices including performance management, SP, employee development, and knowledge management supports retention of hidden talent (Schweer, Assimakopoulos, Cross, & Thomas, 2012). Talent management builds upon the foundation of talent intelligence. Talent intelligence is characterized by four practical themes including what expertize do we have, how are we collecting talent intelligence, how are we using the intelligence, and what impact is it having (Kinley & Ben-Hur, 2014).

Transition

In Section 1, I provided a synopsis of the business need for SP. In a fiscally obscure environment organizations face unprecedented fiscal challenges, retention of quality human capital must remain a lead focus. Succession management is a process of determining roles, successors, and the future (Stadler, 2011). Society faces the realization of the multi-generational workforce. With the added complexity of managing a multi-generational workforce, leadership should consider practices tailored to employee retention. The literature indicates that succession principles build collaborative partnerships by leveraging human capital. In Section 2, the purpose statement of the study clarifies the need for the study. The case study project considers the research design. The research design includes (a) research method (b) participants (c) population sample (d) ethical considerations (e) data collection techniques, and (f) data analysis. A case study is necessary to capture existing questions regarding a multi-generational perspective. In Section 3, I presented the results of the case study, identify and discuss themes, and apply the themes to professional practice. I also considered implications to social change and make recommendations for action and further research.

Section 2: The Project

In the previous section, I described historical issues and research about SP. As record numbers of leaders near the retirement age, the future health of the non-profit sector is threatened (Gothard & Austin, 2014). Due to the number of federal employees regularly retiring and the ever-changing mission of the ANG, an SP process strategy would be beneficial. Section 2 presents a qualitative case study beginning with the role of the researcher, identification of participants, population sample, ethical research considerations, data collection techniques, and data analysis.

Purpose Statement

The purpose of this qualitative case study was to explore SP strategies used by ANG leaders to retain skilled workers. The population of ANG senior leadership within the WMD participating in the civil service retirement system reflects the typical demographic throughout the nation (DOD, 2012). The location represents a typical ANG organization with a standard distribution of skilled workers engaged in the 20-year federal civil service retirement system (Clarke & Kelk, 2014). This study may affect social change by potentially strengthening organizational and community relationships and building corporate continuity by improving employee retention.

Role of the Researcher

In this study, my role as researcher was to gather and analyze data from participants. As a Washington Air National Guardsman, I serve with or know participants in the area. The participants are current or former federal employees with the ANG. The participants did not have a reporting relationship nor did they have a commander or power relationship influencing their participation. Any direct report or individual in my direct chain of command did not participate due to the potential conflict of interest.

Bias is a predisposition or preconceived opinion that prevents a person from impartially evaluating facts (Chaturvedi, 2010). I have been a military member for over 20 years, and I use both military and corporate civilian professional experience to mitigate bias. Researcher bias is an error due to improper procedure or allowing personal beliefs to affect experimentation, which compromises the integrity of research (Montoya, 2014). To mitigate personal bias, I used digital audio of all interviews and transcribed each interview prior to conducting analysis and findings.

The purpose of qualitative research is to advance understanding of social problems and improve social circumstances (Cooley, 2013). Data collected through skilled observation and interviews can provide rich research data (Xu & Storr, 2012). I conducted one-on-one interviews with participants and used Walden approved disclosures and interview protocol as outlined by the University Institutional Review Board (IRB).

Additionally, I followed the ethical protocol identified in the Belmont Report. The Belmont Report protocol established a distinction between research and practice (Brody, Migueles, & Wendler, 2015). The Belmont Report describes four key principals of ethical community-engaged research including (a) embodying ethical action, (b) respecting participants, (c) generalizing beneficence, and (d) negotiating justice (Bromley, Mikesell, Jones, & Khodyakov, 2015).

Participants

In this study, my focus was on DOD employees, specifically ANG civil service employees. In qualitative research, findings are a result of a collaboration between researcher and participants (Darvish & Zahra Najafi, 2014). The criteria for participating in the study included: (a) persons from either WANG or from the headquarters for the Air National Guard Readiness Center (ANGRC) with a minimum of 5 years of experience in the ANG, (b) those either currently or previously federally employed civil service technicians from Washington State, (c) or civil service employees invested in the civil service retirement system with a minimum of 3 years of experience supervising guardsmen who provide unique longitudinal corporate knowledge relative to SP. Additionally, the minimum of five eligible participants must have each served in the military and the federal civil service retirement community aligned with long-term retention and SP principles. The Government Accountability Office determined that 30% of federal employees were eligible to retire by 2016 (Yoder, 2013). Qualitative research can traverse a range of information and analysis methods for participant selection (Cleary, Horsfall, & Hayter, 2014). I selected participants throughout WANG and ANGRC at various stages in their careers.

As a long-term WANG employee and federal civil service employee, I had access to participants in both the WANG and ANGRC. My strategy in developing a working relationship with participants included: (a) socializing the concept of SP and my pursuit of a doctorate degree both verbally and in writing; (b) providing a synopsis and scope of the study; (c) providing disclaimers and consent documentation prior to participation; and (d) explaining the necessity of recording devices, and documentation.

Research Method and Design

Keeping employees engaged in an organization may positively improve employee retention. Establishing balanced networks of advisors and using the network to solve business problems are core elements of employee development (Schweer et al., 2012). A case study consists of an in-depth inquiry into a specific or complex real-world problem (Yin, 2013). I considered multiple research methods and designs but selected the qualitative case study.

Research Method

I considered multiple methods of research including quantitative, mixed method, and qualitative approaches. Quantitative researchers focus on measurements and amounts of the characteristics displayed by people and events (Thomas, 2003). Quantitative inquiry was not suitable for this study due to the necessity to gather numerical data, which would not identify the experiences of guardsmen. The mixed method approach combines qualitative and quantitative inquiry, drawing on interviews and numerical analysis. Mixed method research is useful for addressing quantitative questions, relationships, causal comparative, and cause and effect combined with qualitative inquiry (Frels & Onwuegbuzie, 2013). A quantitative approach was unsuitable; therefore, a mixed methods approach, which applies quantitative inquiry techniques, was also unsuitable. Qualitative research involves the use and collection of a variety of empirical data from personal experiences, introspection, life stories, interviews, observations, history, interactions (Thomas, 2003). Qualitative research offers opportunities to explore and understand the social world (Alexander, 2014). The qualitative method provided a broader understanding of participants' experience with SP in the ANG; therefore, a qualitative method best suited this study.

Research Design

Four possible qualitative research designs include narrative research, ethnography, phenomenology, and case study. The narrative researcher focuses on exploring the life of an individual. Humans have the intellectual capacity to narrate their own experiences. People have unlimited symbolic and metaphoric license to intentionally invent stories that connect personal stories to the dramas of other people (Block & Weatherford, 2013). I am not using the narrative design because it would provide a life story that is not suitable for exploring perspectives on a phenomenon. Ethnography emerged as a relevant design used by researchers to understand how specific societal issues affect different facets or practices of social life (Cruz & Higginbottom, 2013). Researchers use ethnographies to explore unique cultures; however, the intent of this study was not to investigate a unique culture. I did not explore a culture, therefore ethnographic research would have been inappropriate in assessing SP and the effect of SP on personnel retention for the ANG. Researchers use phenomenological design to investigate lived experience by exploring a *snapshot* of experience. My intent in the study was to explore perspectives on SP, which may or may not have been a current practice. Phenomenological design was unsuitable because intuition and free variation would not identify the business issues related to SP. A qualitative single-site case study was appropriate for the study as the approach could provide insight on SP strategies. A case study method provides the ability to address the complexity and context of conditions for evaluation (Yin, 2013).

It is important that qualitative researchers justify samples of data however consider stopping information gathering when redundancy or data saturation is achieved (Cleary et al., 2014). I reviewed all transcripts and notes from participant interviews and used thematic coding to identify data saturation or triangulation. Saturation occurs when the researcher gathers data to the point of diminishing returns and nothing new is added (Marshall, Cardon, Poddar, & Fontenot, 2013). The use of member checking is important to ensure that the researcher has captured meaning as well as word choice (Houghton, Casey, Shaw, & Murphy, 2013). I used member checking by providing each participant with their specific contribution from the interview to review, make corrections, and return to me within one week.

Population and Sampling

The ANG operates 89 Wings across every state, territory, and the District of Columbia, creating a presence in hundreds of communities spanning the nation (Clarke, & Kelk, 2014). Participants for this study were selected from this larger sample because they met the same criteria for their roles in the organization (Palinkas et al., 2013). I used criteria sampling from Washington Air National Guard and from the ANG Headquarters to find participants for the study. The sample of at least five to seven senior ANG civil service employees would have been suitable to gain a deeper understanding of the phenomenon by learning from individual perspectives. Yin (2014) wrote a sample size of six to 10 is adequate but emphasized saturation is more important than sample size and that interviews should continue until the data collection process reaches a point where no new information is being collected. At that point, the interviews may stop. It is important that qualitative researchers justify samples on quality of data; stopping information gathering is dependent on redundancy or data saturation (Cleary et al., 2014).

The criteria to participate in the study included: (a) having a minimum of 5 years' experience in the ANG; (b) being a current or former civil service technician; and (c) having a minimum of 3 years' experience supervising guardsmen or civil service employees. The criteria provided participants would have a basic understanding of ANG structure and civil service equities relative to SP. I conducted interviews in person or telephonically and used a recording device to aid transcription. A common sequential sampling strategy is criteria sampling of the larger sample (Palinkas et al., 2013). Participants are selected from the larger sample because they meet the same criteria or role in the organization or are representative of the sample (Palinkas et al., 2013). I used criteria sampling for the study. I conducted interviews using all standardized questions outlined in this case study until no new data or information was provided by participants. Additionally, I provided each participant with their specific contribution from the interview to review, make corrections, and return to me within one week.

Ethical Research

Research ethics are dynamic and include more than committee approval (Jackson, 2013). Qualitative ethics or ethical literacy informs research method relative to ethical parameters of research (Jackson, 2013). In an era of digitizing and data sharing the very nature of informed consent changes as we lose confidence in what participants are consenting to (Alexander, 2014). For the study, I used the Walden University adult consent form. Participation in the study is voluntary and confidential participants may withdraw from the study at any time via phone call per disclosure. Data gathering instruments according to ethical standard protocols include informed consent, confidentiality, and respondent validation (Brewis, 2014). There are many strategies to protect personal information including secure data storage methods, removal or identifier components, and pseudonyms (Sanjari, et al., 2014). To safeguard the identity of participants I identified participants by number. I stored and maintain all data in a safe place for 5 years to protect the rights of participants. After 5 years, I will destroy all data collected for the study. Researchers have the responsibility for protecting all participants in a study from potentially harmful consequences affecting them as a result of participation (Sanjari et al., 2014). Participants did not receive any monetary incentives however they did receive a letter of appreciation email thanking them for participation in the study. Likewise, all final doctoral manuscripts included the Walden IRB approval number, which was [01-10-15-0404709.].

Data Collection Instruments

One approach of data collection is to conduct and document direct observations of events and actions as they occur in a local setting (Yin, 2013). Effectively the researcher is the instrument. Data collection can occur through observations resulting in field notes, as well as narrative reports, interviews, and review of relevant documents (Conklin, 2015). During data collection, only a more experienced researcher is able to take advantage of unexpected opportunities and exercise sufficient care against bias procedures (Marshall et al., 2013). Therefore, I collected the study data myself using a standardized interview protocol (Appendix A) and manual or electronic devices to capture interview content for transcription. A semistructured interview protocol includes set open-ended questions about research topic to gather data (Bromley et al., 2015). In a qualitative study, the working components include interviews, observations and documentation analysis (Lub, 2015). A documentation trail allows external evaluators to check findings, support data, and assess logical and justified data (Lub, 2015).

Sanjari et al. (2014) stated the researcher is involved in all stages of the study from defining a concept to design, interview, transcription, analysis, verification and reporting the concepts of any themes. Validity is the degree the indicators or variables to research are measurable and accurately represent the data (Lub, 2015). Lub (2015) posited in qualitative method, validity has otherwise been labeled authenticity, adequacy, plausibility and neutrality, nevertheless in the academic community qualitative researchers must demonstrate results as valid. Likewise, triangulation, member checking, and transcription are part of linking purpose to paradigm (Lub, 2015). Four types of triangulation are data source, analyst, theory, and method; however, data triangulation strengthens the validity of a case study (Yin, 2014). I conducted face-to-face interviews recording each interview, review available documentation including notes and transcripts, and review physical artifacts capturing themes to achieve method triangulation in the study.

Member checking involves feedback gathered from participants, the collected data, set categories, interpretations and conclusions of the study (Lub, 2015). I used either face-to-face or telephonic interviews to gather data. I transcribed the interview and provide their specific contribution from the interview, to review, make corrections within one week via email to the participant. Member checking is achieved by having the participant verify the researcher's understanding of what the participant provided in the interview. I followed up with participants through member checking to effectively code and organization data. When there is enough information and no new information or themes are attained data saturation is achieved. Additionally, all interviews followed the same interview protocol (Appendix A).

Data Collection Technique

Interviews represent the most common way of collecting data in qualitative research providing the opportunity for the researcher to collect data (Frels & Onwuegbuzie, 2013). Likewise, representation refers to the ability to extract an adequate amount of relevant information from participants optimally under conditions of data saturation (Frels & Onwuegbuzie, 2013). Getting the right amount of data through interviews can accomplish the research objective (Marshall et al., 2013). For the study, I used individual interviews, and audio recording to capture participants input. Preparing for data collection includes gathering interview data and transcribing audio-recordings of the interviews (Schaik, O'Brien, Almeida, & Adler, 2014). I transcribed audio recordings of interviews. Likewise, member checking involves feedback obtained from participants on the collected data (Lub, 2015). The researcher may also review findings from other participants for credible analysis (Thomas & Magilvy, 2011).

The advantage of data collection in qualitative research is the flexible treatment of protocol forms approved ethics boards (Xu & Storr, 2012). A potential disadvantage to data collection is not understanding saturation. The term saturation arose from grounded theory; however, in recent years, qualitative researchers have adopted the term without a stringent data collection method (Cleary et al., 2014). To facilitate adequate data collection, identify themes across and between groups (Cleary et al., 2014). I used all interview questions with at least five to seven participants, continuing with interviews until the study reaches data saturation. Additionally, if data saturation is not met with the initial five participants I used snowball sampling to address data saturation. Snowball sampling is the selection of additional candidates from the target population with the assistance of previously selected participants (Fusch & Ness, 2015). The four types of triangulation are data source, analyst, theory, and method (Yin, 2013). When method design collects overlapping data, triangulation exists and greater confidence can be placed in the findings (Yin, 2013). Of the four types, data source and method strengthen the validity of a study (Yin, 2013). I used document organization using face-to-face dialog, telephonic dialog, interviews, audio recording, and transcripts. I used methodological triangulation for this study.

Data Organization Technique

There are several strategies to protect research (Sanjari, et al., 2014). I used Microsoft programs including Word and Excel to log my research progress. Word processed data such as interview transcripts, reports and documentation can be imported into a project file (Sinkovics & Alfoldi, 2012). I recorded all interviews in person and telephonically, collect notes, and safeguarded all documentation. I stored all physical data in a locked safe until I complete my study and upon completion transferred all digital documents from my password-protected laptop to an electronic storage device, and store in a safe. Attending to the rigor of qualitative research journey provides the opportunity for further development of the science (Thomas & Magilvy, 2011). I had all data backed up to an external hard drive secured in a password protected fireproof safe and retained for 5 years.

Data Analysis

Analyzing data and capturing the results are essential to a doctorate study (Lub, 2015). A sample size of six to 10 is adequate for a case study; however, data saturation is more important than sample size (Yin, 2014). It is important that qualitative researchers justify samples on quality of data while attentive to data saturation (Cleary et al., 2014). The dual challenge of data complexity and trustworthiness with qualitative studies results in qualitative data analysis (Sinkovics & Alfoldi, 2012). There are different lenses allowing researchers to make sure biases do not dominate documentation and data analysis, enlarging space for discussion on similarities within the research project (Cooley, 2013). The researcher must remember that both participants and researchers bias worldview is present in all social research; however, data collection and data saturation address bias (Fusch & Ness, 2015). There is a direct link between data triangulation and data saturation (Fusch & Ness, 2015). Likewise, data saturation is reached when there is enough information to replicate the study when the ability to obtain additional new information has been attained and further coding is no longer feasible (Fusch & Ness, 2015).

For data analysis, I recorded telephonic or face-to-face interviews, transcribe and code the data for themes. I used method triangulation using face-to-face dialog, interviews, audio recording and transcripts. There are several kinds of software designed to aid in the task of coding data analysis (Sinkovics & Alfoldi, 2012). Keeping notes, developing thematic coding schemes and building a casebook make it easier for the researcher to evaluate research design (Sinkovics & Alfoldi, 2012). I coded and analyze the data using Microsoft software suite. I used Excel to sort data into thematic categories supporting the central research question for this study of SP strategies that leaders may take to improve employee retention.

Reliability and Validity

Reliability

Increasing criticism of the reliably and objectivity of qualitative research has led to expanded interest is methodological standards (Lub, 2015). Reliability and validity are ways to establish trust or confidence in qualitative research (Thomas & Magilvy, 2011). I ensured reliability of the study by preparing detailed notes for each interview. Consistent and detailed documentation in qualitative research ensures reliability of the study (Laintz, 2015).

Dependability is how the study process is consistent over time (Laintz, 2015). Additionally, Thomas and Magilvy (2011) supported an audit trail (a) describing the purpose of the study, (b) discussing how and why participant were selected, (c) identification of data collection methods, (d) explanation of data analysis, (e) presentation of research findings, and (f) description of techniques used, contributed to research dependability. In this study, I conducted interviews sharing the purpose of the study and shared how participants were selected, transcribe audio recordings, conduct data analysis, and document themes and findings in the study.

Validity

Validity is the degree to which indicators of a concept are measurable (Lub, 2014). However, with qualitative research the definition of validity does not work as qualitative research does not focus on ratios (Lub, 2014). I ensured validity by selecting participants from different geographical regions. A form of validity is transcribing data and comparing to audio recording prior to the finalization of the study (Laintz, 2015).

Credibility allows others to recognize the experiences contained in the study through the participant's interpretation (Thomas & Magilvy, 2011). To establish creditability, the researcher reviewed transcripts identifying themes across participants (Thomas & Magilvy, 2011). I reviewed all transcripts and notes from participant interviews and use thematic coding to identify data saturation or triangulation. Saturation occurs when the researcher gathers data to the point of diminishing returns and nothing new is added (Marshall et al., 2013). Saturation occurs when the addition of new data provides no further information, and at this point, the researcher concludes the interview process (Cleary, Horsfall, Hayter, 2014). I assessed saturation by using the set of interview questions with every participant in the study in every interview and comparing data. Additionally, I used snowball sampling to ensure data saturation by requesting additional participant's referrals from existing participants.

Transferability considers if the findings relate and are transferable to other contexts by researchers (Laintz, 2015). Likewise, one strategy to establish transferability is to provide a description of the population to be studied using demographics and geographical boundaries (Thomas & Magilvy, 2011). I interviewed Guardsmen and civil service technicians from both the Northwest and East coast. Future research may focus on similar populations. Confirmability happens when creditability, transferability and dependability have occurred (Thomas & Magilvy, 2011). I achieved confirmability by following Walden interview protocol, collecting data, transcribing data, conducting thematic analysis and documenting results within the study.

Transition and Summary

In section 2, I clarified how the purpose statement of the study clarifies the need for the study. I discussed research design and method. The research design includes (a) research method (b) participants (c) population sample (d) ethical considerations (e) data collection techniques, and (f) data analysis. In section 3, I presented the research completed in the study. I presented organized data, present findings, and consider themes. I also discussed the implication of my findings as it relates to social change for business. I recommend further research.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of this qualitative case study was to explore SP strategies used by ANG leaders to retain skilled workers (Clarke & Kelk, 2014). The population for the study included five ANG guardsmen with state affiliation in Tacoma, Washington. This section includes a discussion of the findings identified throughout the qualitative analysis of data from face-to-face semistructured interviews using set interview questions along with transcribed artifacts. I present the findings and discuss the themes identified. I also discuss potential business practices and social change implications and make recommendations for action and further research.

I believe ANG leadership must actively engage in SP strategies to effectively retain skilled workers. In this research, I discovered five themes: (a) skills focus verses strategic, (b) informal verses formal SP, (c) individual verses organizational, (d) priority for retention verses recruitment, and (e) limited skill leads to mission gaps. Considering fiscal constraints with continued operations tempo, leaders must leverage a robust SP strategy including formalization, organizational transparency, and focus shifted from recruitment to retention. There needs to be a paradigm shift that advances leaders thinking strategically about talent development and building future leaders (Croteau, 2010). Formal SP can increase personnel enthusiasm, minimize anxiety, and guard against bias (Gothard & Austin, 2014). Failure to acknowledge generational differences in retention and recruitment strategies may lead to having few highly qualified and trained individuals capable of moving into vacated positions (Gudwich, 2012).

Presentation of the Findings

The central research question guiding the study was: What SP strategies do ANG leaders use to retain skilled workers? Through interviews with WANG guardsmen I identified five themes, which I outline them in the following paragraphs. The themes align with the conceptual framework used in developing this case study. The conceptual framework included organizational leadership theory (Bass, 2009), succession theory (Wang et al., 2004), and employee retention (Oladapo, 2014), and was founded in qualitative methods (Lub, 2015). I also describe in what ways the findings conform, disconfirm, or extend knowledge by comparing the findings to the conceptual framework of this study.

The five themes were: (a) skill focus verses strategic focus, (b) informal verses formal SP, (c) individual verses organizational, (d) priority for retention verses recruitment, (e) limited skill leads to mission gaps. During all of the interviews participants identified all five themes. The answers were consistent suggesting the conceptual framework and the interview questions assisted identification of themes during the face to face interview process.

Theme: Skills Focused Versus Strategic Focus

Effective SP is both talent management and strategic. All five participants (100%) commented on how current leadership focused on meeting the regulatory requirements of a position. The participants reported, succession begins by completion of initial training, meeting identified individual objectives and by developing networks through with professional organizations. Three of five (60%) of participants identified SP as data focused and regulation driven. In essence, if guardsmen do what is required of them, they are part of organizational succession. Four of five (80%) participants acknowledged the ANG annually participates in a force management process identified as a selective retention board (SRB). The SRB process is where leaders are tasked with the responsibility to consider guardsmen who have over twenty years of service in order to determine if they are to be retained in the work force. The SRB process effectively addresses the individual's skill levels and career progression. However, the SRB process is limited to considering the current workforce and the people in current positions. To elevate from an individual skill focus to strategic focus, leadership would need to shift from data mining to strategic alignment. Succession planning is not just planning how to fill positions; succession should be a comprehensive organizational strategic process for every critical position in the organization (Fibuch & Van Way, 2012). These factors align with individuals building their skills as opposed to focusing on how those skills align to a strategic organizational SP.

The literature suggested that SP includes data or talent management (employee development, performance management, and training), but also addresses recruitment and retention. Regardless the industry, succession-based efforts aligning with strategic plans enhance comprehensive SP (Gothard & Austin, 2014). Strategic SP begins with management and must address the critical need for continuity and individual development of key people in the professional, technical, sales, and production areas of the organization (Shaik, 2013). Succession planning occurs when leaders create collaborative partnerships to build systems for the planning and management of succession (Zepeda et al., 2012). All five participants stated current SP efforts are individualized and are maintained within the smaller organization verses the broader higher level institution. The four essential factors of SP are: (a) successor development, (b) predecessors' influence, (c) intergenerational relationships, and (d) management advice (Wang et al., 2004). To effectively develop an organizational succession plan, leaders must consider corporate continuity as well as individual force management. The evolution from skills-based planning to strategic SP is necessary to improve quality of skilled workers and organizational continuity. Succession planning includes talent management or processes for talent absorption, retention, and development of employees (Ahmadi, Ahmadi, & Abbaspalangi, 2012). Talent management includes training and experience, data elements consistently discussed by all participants.

Transformational leadership theory and successional planning theory suggest a broader or strategic interpretation of SP. Organizational SP includes retaining talent and managing healthy organizational culture (Sims, 2014). Strategic leaders must be adept at finding common ground and achieving buy-in regarding SP among stakeholders who have disparate views and agendas (Schoemaker, Krupp, & Howland, 2013).

Theme: Informal Versus Formal SP

All participants (100%) indicated the main form of succession planning they have seen over the years has been in dialog with leaders. Discussion, while a necessary part of determining the employee's career aspirations, is missing a crucial aspect linking an individual career path to a strategic succession plan. Two of five (40%) of participants indicated their immediate leadership within their section discussed career paths and regulatory requirements on a recurring basis with employees. All participants (100%) reported that current senior leadership have made efforts to begin conversations across the enterprise; however, those efforts are just beginning. All participants (100%) acknowledged informal succession plans have limitations with current leadership. In essence, an informal succession plan becomes a career planning conversation with no organizational leadership support. The discussions that occur with first line supervisors tend to be skill or career field specific.

LaManna (2012) posited SP include timelines along with the following: (a) a vision specific to the business, (b) values and guiding principles, (c) short and long-term goals, (d) personal goals and retirement plans, (e) stakeholders; (f) successor criteria, and (g) intended legacy for the organization. The absence of a formal and measurable written plan linked to the organizational strategy indicates no definite plan at all. Likewise, formal schooling, training, and experience are factors influencing an HCM investment (Mani, 2013). Human Resource Management (HRM) practitioners and key organizational decision makers should consider formal systems and informal messages in HR systems (Jisung, Soo-Young, Sangmin, & Se-Ri, 2015).

Succession theory suggests a broader and formal strategic SP for an organization aligned with the strategic plan. Both LaManna and Mani indicate essential tenants of SP. The strategic leader must understand the value of developing plans to set the organization on course for success. The tenants of employee retention align management of human capital and strategic focus. Development of a formal SP affords current and future leadership a tool to effectively achieve successful HCM.

Theme: Individual Versus Organizational

All participants (100%) reported that current SP is focused on individual efforts and regulatory compliance to be considered for upward mobility. Skills development positively contributes to work performance; however, if there are variances in skill within the work center, the work center improves but lacks organizational influence. All participants (100%) identified that current SP is focused on specialty and skills training for specific job requirements. One of five (20%) of participants acknowledged that there is some focus on leadership development and training; however, the main SP effort is based on individual skills enhancement. Three of five (60%) of participants acknowledged senior leadership efforts within the last 18 months to begin building a foundation for a succession plan. However, when asked if that plan was formal and shared transparently within the organization, participants were limited to immediate work center plans verses organizational plans. All participants (100%) had participated in HCM, professional development, or force management practices; however, those practices are currently missing the strategic element. Two of five (40%) of participants identified it was uncertain who would succeed current senior leadership. However, change was pending within the next 6 months. All participants (100%) acknowledged limitations on how current plans would be used to develop future successors.

The literature supports a difference between human capital management and strategic SP HCM relates to investments in an individual employee’s value to the workforce (Mani, 2013). HCM is managed at the individual level and focused on independent challenges within a work center. The challenge manager’s face is to manage employees from different backgrounds effectively and to understand the many different individual needs that stem from gender, generation, and culture (Yi et al., 2015). The direct manager or leader affords opportunities to the individual employee to leverage talents and build strengths. Providing individual and group training, job aids, and current procedures and samples to assist employees in daily activities enhances knowledge sharing (Connell, 2013). Individual focus is a part of SP in that leadership must consider all employees and determine how they fit into the overall succession plan. Organizational leaders positively improve performance through SP and successor development (Wang et al., 2004).

Bass (2009) posited transformational leadership adapts SP to meet organizational long-term goals. In this vein, organizational leaders need to modify aspects of their organizational culture to create an environment that facilitates leadership retention, healthy SP and effective employee transitions (Gothard & Austin, 2014). It is incumbent on senior organizational leadership in the ANG to transform organizations and culturally shift to strategic SP. Transformational leadership occurs when organizational interest exceeds employees' self-interest by introducing social exchange between the organization and employees to lessen turnover intention and behavior (Tse et al., 2013).

Theme: Priority for Retention versus Recruitment

The WANG is well positioned with recruiting resources focused on marketing to local community and colleges; however, minimal staffing is allocated to focus on retention. Three of five (60%) of the participants reported the organizational focus has historically been recruitment. When participants were asked how important retention is, all indicated it was essential to keeping quality skilled workers. Two of five (40%) of the participants acknowledged senior leadership should shift focus from recruitment to retention. Participants also acknowledged that retention is a significantly more complicated task requiring deeper understanding of why employees are leaving. Essentially, recruitment is one element of the equation, but when leadership considers other elements, a more robust plan evolves. Guardsmen are the most important asset of the ANG, and retention is essential for the NG as an operational force (SAC, 2012). There are systems in place and staffed to onboard an employee and provide individual development plans. Participants reported uncertainty on how to develop a strategic organizational succession plan. However, they posited that the goal should be to retain quality employees given existing systems currently in place to manage the force.

All participants (100%) reported various systems currently being used to manage the force. These systems included training, development, SRB, manning documents, and Air Force Specialty Codes. The reported systems only partially address essential elements to a strategic SP. The current predominate focus in the WANG includes recruitment elements rather than retention elements. Two participants (40%) suggested considering why employees leave the organization in order to best minimize attrition. To shift from historical recruitment efforts to include retention efforts builds the foundation for a robust and strategic organizational succession plan.

The literature supports both recruitment and retention as critical aspects of SP. SP is concerned with identifying posts that are critical to success, choosing the best way to satisfy future requirements, and developing strategies to determine the optimum mix of internal and external recruitment (Cannon & McGee, 2011). Oladapo (2014) asserted that talent management scope has five major categories: recruitment, performance management, SP, training and development, and retention. Armstrong et al. (2010) asserted comprehensive recruitment, selection, extensive training, and development were associated with decreased rate of employee turnover and higher levels of productivity and profitability. Systems are essential to a strategic organizational SP. The HR field has evolved out of labor tensions between employer and employee in order to ensuring legal compliance, resulting in development of knowledge of employment staffing, recruitment, training, compensation, and benefits (Maugans, 2015). Likewise, HRIS assist HR personnel to manage employee development, performance appraisals, compensation, and recruitment and selection (Al-Dmour & Al-Zu'bi, 2014).

The theory of transformational leadership suggests considering partnerships to achieve organizational goals. HR professionals identified an opportunity for social networking to enhance employee engagement, employee satisfaction and employee retention (Parez et al., 2013).Shifting from heavy recruitment efforts to retention efforts aligns with succession theory. Employee retention is critical to the long-term health and success of the business (Mishra, 2010). Promoting employee intention to remain employed requires a multifaceted approach to influence retention (Tourangeau et al., 2013).

Theme: Limited Skills Leads to Mission Gaps

The aging federal workforce eligible for retirement in 2016 presents a basis for a growing business problem in retention of primary leadership within the NG (DOD, 2012). All participants (100%) reported a broad age range within work centers.

All participants identified individual plans lack an essential element as local leadership leaves. Two of five (40%) of participants acknowledged there are significant gaps in skill and knowledge if certain employees were to retire in the next 2-5 years. The current effort to build a current bench of quality talent effectively addresses skills verse corporate continuity. Two of five (40%) of the participants reported leadership is focused on annual force management plans over strategic SP. Three of five (60%) of participants identified the need to develop strategic SP as an effort to mitigate knowledge and skill gaps within the workforce.

The literature supports the relationship between SP and strategic planning show a significant correlation between assessment of organizational talents, competent personnel, existing skills, and determination of skills required for the future (Darvish & Zahra Najafi, 2014). The continued fiscal strain, coupled with unclear succession plans, influence retention rates of the federal dual status workforce (WMDSP, 2012). Downsizing generates profound implications and organizational consequences (Hansson, 2015). Leadership must mitigate the effects of downsizing caused when retained employees lack the necessary knowledge, skills, and ability to fill positions (Hansson, 2015). Individuals gain new resources and broaden their control through enhancing their skills through development programs (Parker, Johnson, Collins, & Nguyen, 2013).

Succession planning includes talent pool cultivation, career health monitoring, holistic assessment, directed skills enhancement and adaptability (Shamsuddin, Chee-Ming, Wahab, & Angzzas Sari, 2012). Organizational leadership must focus on skills development and also take efforts to minimize gaps in knowledge or corporate continuity to ensure the mission is accomplished today and in the future.

Generational theory suggests that WANG leadership needs to tailor SP to a broad range of employees within the workforce. Proactive organizations are aware of mission-critical positions and performance and anticipate turnover (Kello, 2014). To best mitigate adverse mission impact leaders must consider efforts to retain essential skills from within. The aging workforce poses a leadership opportunity supported in retention and succession theory. To address the aging workforce leaders can develop strategic SP to minimize corporate degradation of mission.

Applications to Professional Practice

Effectively managing a predominately part time workforce with dual roles both civilian and military requirements was difficult, particularly with a consistent leadership turnover. Clarke and Kelk, (2014) noted the broad population of the ANG operates 89 Wings across every state, territory, and the District of Columbia, creating a presence in hundreds of communities spanning the nation. The data collected from participant interviews suggested noteworthy concerns with skill management, leadership, resources, and organizational culture. Leadership needs to address the gaps identified in the interviews to support skilled employee retention rates.

To ensure an understanding of the case study, WANG leadership may need to differentiate between skills or data based leadership decision as force management. The new phase of SP includes talent management or processes for talent absorption, retention and development of employees (Ahmadi, Ahmadi, & Abbaspalangi, 2012). Additionally, strategic SP as adapted by corporate businesses include elements appropriate within the DOD and the WANG. The distinctive challenges that the WANG faces include: (a) skill focus verses strategic focus, (b) informal verses formal SP, (c) individual verses organizational, (d) priority for retention verses recruitment, and (e) limited skill leads to mission gaps.

While the participants interviewed expresses a need to focus on SP they were unable to identify effective methods to alter an organizational shift in business practice. There may be a level of complacency given historical business practice focused on recruitment verses retention. SP considers force management practices, in essence a numbers-focused process managing the finite numbers of the workforce (Wright, 2012). The WANG leadership may consider expanding force management elements to include corporate SP elements inviting a hybrid strategic SP. WANG leadership should not solely focus on how they have done business in the past given the ageing workforce and the millennial generational influence in the workforce today.

Implications for Social Change

Succession planning is not a singular or simple task, Succession challenges include managerial, organizational, cultural, legal, education and cost (Tabatabaee, Lakeh, & Tadi, 2014). Ongoing fiscal strain, coupled with unclear succession plans, influence retention rates of the federal dual status workforce (WMDSP, 2012). Leaders determine how succession influences the cultural contexts in the workplace (Renihan, 2012). All participants (100%) recognized the requisite and probability to focus on SP. As leaders begin to take a more strategic approach to SP by entertaining the life cycle of a guardsman, optimizing the extended duration of employee tenure, and formalizing a written plan, sustainable change leading to retention of skilled workers is possible. In the NG 80% of members work full time in local communities and garner relationships with a wide variety of local and national employers.

Transformational leaders must maximize human capital management to sustain manpower requirements and remain successful in mission accomplishment. This equates to actively considering the differences between force management and SP, broadening individual plans to include strategic goals, shifting from informal to formal succession plans, and embracing culture change shifting from recruitment efforts to employee retention. Leaders have the opportunity to adopt tenants of proven corporate SP to embrace generational expectations. Military leadership when they leverage civil practices, are optimally positioned to lead a SP effort away from a minimal focus on manpower and skill to embolden future leaders’ ability to think strategically and project future success in retaining highly skill workers. Essentially, the majority of guardsmen maintain full time careers with corporate agencies in their local communities, leadership could leverage corporate SP tenants from within their own workforce.

Recommendations for Action

The participants interviewed provided insight to the WANG and the challenges they face. Below is a listing of recommendations flowing logically from my discussions with participants, I submit ANG leaders may benefit from considering the recommendation. ANG leadership may use the recommendations in a working group setting to consider tangible efforts to lead SP efforts, a working group product could be disclosed to leaders throughout the nation, and additional training provided to assist leadership in transitioning from current business practice.

My six recommendations are as follows:

1. Leadership must consistently build on the existing force management practices addressing individuals and draft formal organizational SP. By using both options the formal plan will build strategic continuity within the workforce.
2. Leadership must embrace generational differences when considering individual development plans, and align to the strategic SP. Building an innovative plan includes addressing both individual generational needs as well as strategic needs.
3. Leadership must create an environment of collaboration to build formal SP at the lowest level to be incorporated into higher level SP. Synchronized military planning requires alignment to organizational strategy.

4. Leadership must tailor formal SP to each organization while aligning to the next higher level opportunities. Identification of the successors bench will align organizational and strategic planning
5. Leadership must adopt an organizational culture of retention verses recruitment when developing formal SP. Building an internal bench of skilled and fully trained personnel.
6. Leadership must develop a formal local level SP aligned with national strategy. Preparing for inevitable budget cuts requires strategic efforts.

I targeted my recommendations at military leadership, however believe that they could be adapted to all NG organizations. I intend on publishing my findings upon graduation. I intend to disseminate my findings through ANG leadership.

Recommendations for Further Research

I conducted a qualitative case study to consider strategies used by leaders in the WANG. Limitations are potential weaknesses that are beyond my control (Connelly, 2013). A limitation could be bias, I attempt to control bias in my approach, and however, there may be bias beyond my control including bias on behalf of participants in answering questions. I also used open-ended questions to guide the interview process enabling participants to drive the content of the study. The limitations of this study included limiting participants to federal civil service employees in Washington State. Washington State has a large military population at multiple military bases representing most branches of service, however other states with minimal military presence may offer different perspectives on SP. Further research on SP should also focus on employee attrition cost and strategic retention efforts.

All participants, 100%, identified current SP efforts are specialty or skill specific and predominantly informal. Additionally, all participants expressed the importance of employee retention as the best way to build corporate continuity. All participants expressed interest in a SP process used consistently through the organization versus independent SP by section. All participants identified the existing process used for SP is predominately a force management process versus a strategic SP. Also, 40% of participants identified a shift in current leaderships focus to consider broader SP however currently that is limited to senior personnel and has not filtered down to all levels of employees.

Reflections

In this qualitative case study, I explored current SP efforts used by leadership in the WANG. I gathered valuable information about organizational leadership efforts, insight on prevalence of force management principles, and identified that employee retention is essential to organizational success given the generational differences within the workplace. The case study process and results allowed better insight in the complexities of qualitative research. While conducting the case study I moved away from Washington State, which added logistical complexities with participants. The problem exists fundamentally because organizational strategy is not a factor in force management efforts.

The data collection and analysis was very fulfilling. The participants were forthcoming and willing to share their experiences freely. The most difficult part of the analysis was the transcribing process, essentially taking much longer than I had expected. While I considered using transcribing services, I found that sitting through each interview and doing the transcribing myself really assisted in fully hearing the participant's perspectives. I was surprised how consistently participants expressed the need for SP and employee retention. The main lesson learned is there is a need to educate military leadership that force management is only part of the effective SP. I now have the language and confidence to articulate that message to leadership.

Conclusion

Guardsmen are the most important asset of the ANG and retention is essential for the NG as an operational force (SAC, 2012). The purpose of the qualitative case study was to explore SP efforts used by the WANG leadership in anticipation of significant budget constraints and fiscal decline. The DOD faces a $259 billion reduction over the next 5 years; the NG must define competitive value within the DOD in a fiscal crisis (DOD, 2012). The population for the study included WANG senior service members with 5 years in the ANG.

The findings of the study produced five main themes including: (a) skill focus verses strategic focus, (b) informal verses formal SP, (c) individual verses organizational, (d) priority for retention verses recruitment, and (e) limited skill leads to mission gaps. The Guard faces unique application of succession given the varied generations within the workplace (WMDSP, 2013). The broad age range within the aging workforce coupled with fiscal constraints presents great opportunity for leaders to adopt SP strategies. Instituting strategic SP that address the themes identified from the research may effectively address a pattern of low retention. Further research on this topic should include other ANG units within the nation.

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Appendix A: Interview Protocol

Interview: SP Strategies within the ANG to Retain Skilled Workers

A. The face-to-face interview will begin with introductions and an overview of the research topic.

B. I will advise the participant I am respectful of their time and thank them for participating in the study.

C. I will remind the participant of the recorded interview and the conversation we are about to have will remain strictly confidential.

D. I will turn on the recorder, announce the participant's identifying code (Participant 1), as well as the date and time of the interview.

E. The interview will last approximately 45 minutes to obtain responses to 11 interview questions.

F. I will explain the concept of member-checking, ensure each question is thoroughly explained, and confirm the answer provided by the participant is recorded as intended by contacting participants via e-mail with transcribed data, and request verification the accuracy of collected information within 5 business days.

G. After confirming answers are recorded to the satisfaction of the participant, the interview will conclude with a sincere thank you for participating in the study