“There are cemeteries all over the world filled with indispensable men.”

Charles De Gaulle

“No duty the Executive had to perform was so trying as to put the right man in the right place.”

Thomas Jefferson
Table of Contents

CHAPTER 1 – Introduction ........................................................................................................ 1

CHAPTER 2 – A Review of Literature ..................................................................................... 3

Best Practices for Succession Planning ................................................................................. 3

Succession Planning in the Public Sector ............................................................................. 8

CHAPTER 3 – Oregon Public Employees Retirement System (PERS) ....................... 14

Background on PERS ............................................................................................................. 14

Oregon PERS in Crisis ........................................................................................................... 14

PERS Retirement Benefits Calculations .............................................................................. 16

Eligibility for PERS Retirement ........................................................................................... 16

CHAPTER 4 – Succession Planning ....................................................................................... 18

Succession Planning in the Public Sector ........................................................................... 18

What Public Employers Need to Train For ........................................................................ 19

Putting Oregon Back to Work ............................................................................................. 19

CHAPTER 5 – Analysis of Oregon Government Workers Eligible for PERS ........... 20

Research Design and Data Collection ................................................................................. 21

Analysis of Survey Data Gathered ....................................................................................... 21

CHAPTER 6 – Conclusion ..................................................................................................... 25
Table of Contents (continued)

References ................................................................................................................................................. 26

Exhibit #1 – Email Request to Oregon HR Directors at PERS Public Agencies ... 28

Exhibit #2 – PERS Rates of Retirements ....................................................................................... 29

Exhibit #3 – PERS Retiree Payments by Category ................................................................. 30

Exhibit #4 – Succession Planning Pipeline Characteristics ................................................. 31

Exhibit #5 – Job Vacancies by Type (Fall 2012) ................................................................. 32

Exhibit #6 – Older Population Projected to Double as a Percentage ......................... 33

Exhibit #7 – Summary Data Collected (with and without Education) ......................... 34

Exhibit #8 – Current Oregon Government Employees Already Eligible to Retiree Today ........................................................................................................................................... 35

Exhibit #9 – Oregon Government Employees Eligible to Retire Today, in 5 Years and in 10 Years ........................................................................................................................................... 36

Exhibit #10 – Current Oregon Employees Eligible to Retire over the next 10 Years ........................................................................................................................................... 37

Exhibit #11 – Number of Current Oregon Employees Eligible to Retire over the next 10 Years, by Position Type ........................................................................................................................................... 38

Exhibit #12 – Percentage of Current Oregon Employees Eligible to Retire over the next 10 Years, by Position Type ........................................................................................................................................... 39
CHAPTER 1

Introduction

Is there a greying of public employees in Oregon? The impact of the retiring Baby Boomers did not materialize as originally expected, but is that tsunami wave now ready to hit? What impact will the significant number of retirees have on the functioning of the State, counties, cities and special districts in Oregon? As many retire, our governmental agencies lose historic perspective and much of their needed knowledge base. Planning for the future can prepare the public sector for the eventual retirements, and development of recruitment policies can ensure sufficient staffing levels in the future. Furthermore, planning for this transition can help us identify the changing workforce needs within Oregon public sector.

Using data gathered from various Oregon public entities relating to employees who are eligible to retire over the next five years; I have identified which positions Oregon employers should be focusing their succession planning efforts. In order to best illustrate retirement trends by position type, the data requested from Oregon Human Resource Directors included years of service, age of employees, PERS tier level and specific job titles (Exhibit #1).

Importance of this Project

The future employment needs in the public sector organization in Oregon has not been well-assessed on a state-wide level and as a result very little meaningful information is available. Despite the lack of specific information there is a general expectation about an upcoming wave of baby boomer retirements. The question is whether public sector employers are ready for them to leave their positions. The Public Employees Retirement System (PERS) maintains a comprehensive database of retirement statistics, however, their statistics do not include job types. Consequently, Oregon’s public sector leaders do not know which types of
positions will be needed the most. For example, answers are needed to such questions, Are 90% of our public administration positions eligible to retire? Do we need to recruit and train planners or engineers? How best should we design our succession planning to address the organizations needs? If

The public sector needs to change its recruitment and retention processes. The current challenge to public sector is to identify where the vacancies will occur and adjust recruitment and training programs accordingly. The best way to do this is through strategic long-term succession planning with a focus on the positions which will be needed the most due to retirements. Reacting to one open vacancy at a time in an ad hoc fashion will not necessarily provide what is best for the agency in the long term. Multiple retirements spread throughout the organization over relatively short periods of time may create unintentional talent gaps in knowledge, skills and abilities. In addition, these retirement vacancies often have unanticipated effects on the organization, the division and more commonly the departments. Improving the process through succession planning is more than just filling one position at a time but it involves proactive planning that will intentionally fill vacancies in alignment with the needed skills over the long term.

The concerning challenge to public sector is the sheer quantity with those eligible to retire in the next five years. Another area of concern is that public sector employees tend to stay in the public sector, therefore this information is of special interest to all public sector employers as employees often move between public agencies. If these talent pools remain in public sector for extended period of time, then public employers may be training the wrong types of employees too early. Public employers need to be much more strategic about
workforce planning, how they view openings, vacancies and recruitments. Filling positions not just for today’s needs, but for future needs.
CHAPTER 2

A Review of Available Literature

Best Practices for Succession Planning

*Best Practices for Succession Planning*, published in 2007 by Mark Solbol, Phil Harkins, and Terence Conley introduces succession planning, discusses the best practice elements of succession planning, provides multiple case studies, and provides a succession planning tool kit. The authors make a clear point that the key to succession planning is that it is not a single process, but rather needs to be a repeating process in order for it to be sustainable over time. The authors refer to as the Four Stages of Succession Planning Development as follows: (1) Design/create system, (2) Analyze resources, (3) Prepare organization implementation, and (4) Monitor and measure. Again, the key element is the repeating cycle of developing a solid succession plan for an organization that is sustainable over time.

The authors define succession planning as a systematic approach to ensuring that an organization has a steady, reliable pipeline of talent that will meet the organization’s future needs in leadership and other linchpin roles. They developed the following seven best practices in helping place the right people in the right jobs at the right time for the right reasons (Solbol et.al., 2007):

1. Build a development mindset in your organization;
2. Drive organization alignment both domestically and internationally;
3. Inspire a “learning organization”;
4. Ensure data-driven decision making;
5. Segment, align, and develop talent;
6. Continually assess your performance culture; and
7. Gain the support and participation of the chief executive officer in the process.

Another popular book on this subject is *Effective Succession Planning* published in 2005 by William Rothwell, Professor-in-Charge of Workforce Education and Development at Pennsylvania State University. Rothwell adds the concept of succession management to the topic of succession planning referring to the subject as succession planning and management. The author provides the details of starting a systematic program to succession planning, discusses refining the program over time, assessing the future, and introduces a concept of closing the “development gap” between the program and actual management of the process.

Rothwell defines succession planning and management (SP&M) as the process that helps ensure the stability of the tenure of personnel. It involves the identification of critical management positions, starting at the levels of project management up to the highest position in the organization. Rothwell discusses the aim of SP&M as matching the organization’s available (present) talent to its needed (future) talent.

Rothwell defines the best practices of effective succession planning (& management) to include the following 15 characteristics (Rothwell 2005):

1. Top management participation and support;
2. Needs-driven with external benchmarking;
3. Focused attention;
4. Dedicated responsibility;
5. SP&M extends to all levels;
6. Systematic approach;
8. Clarification of high-level replacement needs;

9. An obligation to identify and prepare successors;

10. Specific developmental programs established and conducted;

11. High potentials work while developing;

12. Development programs establish familiarity with who, what, when, where, why and how;

13. Developmental experiences encourage critical questioning;

14. Succession planning emphasizes qualities necessary to surpass movement to the next higher-level job; and

15. Formal mentoring emphasized.

Rothwell completes this book with fifteen predictions for succession planning relating to techniques public agencies can utilize succession planning better in the future. Two of these focus on considering outsourcing and consulting when appropriate to fill gaps as well as forming a strategic alliance with another similar organization to meet succession needs.

Best practices in succession planning have been applied successfully at the government level as well. In a white paper entitled *A Guide to the Strategic Leadership Succession Management Model*, the U.S. Government’s Office of Personnel Management Working for America tackled this subject recently. Their study, dated March 2009, was prepared in response to the “Law of the Land” that states “the head of each agency shall establish a comprehensive management succession program to provide training to employees to develop managers for the agency. Congress recognized the large deficits in leadership among an array of challenges confronting organizations in the 21st century. They recognized this gap in future talent and
created a model to build leadership bench strength. A law passed in 2004 called the Federal Workforce Flexibility Act, which requires that heads of agencies, in consultation with OPM, develop a succession plan for their agency.

As with most government mandates, they created a very lengthy white paper amounting to 165 pages outlining succession planning and modeling a way for organizations to implement it. They identified five key “best of practices” which should be addressed (OPM 2009):

1. Strategic alignment (planning and goal setting);
2. Leadership and knowledge management (implementation);
3. Results-oriented performance culture (implementation);
4. Talent management (implementation);
5. Accountability (evaluating results).

This white paper outlines the five phases of a strategic succession leadership model. These phases are (1) establish strategic alignment and direction, (2) identify succession targets and analyze talent pool, (3) develop succession management plan, (4) implement succession management plan, and (5) evaluate succession strategies.

In addition to private sector and government, the educational sector is starting to see the value in best practices of succession planning. There is a wonderful article titled Leadership Succession from The Educational Forum and authored by Andy Hargreaves from Boston College in 2005. The author points at that the most significant events in the life of a school is a change in its leadership and that the failure to care for leadership succession is often neglected. Hargreaves lists out five key elements in “best practices” which should be addressed in all succession plans (Hargreaves 2005):
1. Plan should be planned thoughtfully and ethically;

2. Distributing leadership so not dependent on the talents or frailties of particular individuals;

3. Organizations should wobble some when good leaders leave, but bounce back;

4. Leaders need to give thought to their legacy when they leave, from day one;

5. Any alarming rise in rates of succession should be slowed and requiring at least five years of stay in current management positions before rising.

Hargreaves’ article focuses on the concepts of Inbound, Insider and Outbound Knowledge. Inbound knowledge is the knowledge a leader has to make one’s mark on a particular school or turn it around. Insider knowledge is that which is gained after becoming known, trusted, and accepted within the community. Outbound knowledge is what is needed to preserve past successes, keep improvement going, and leave a legacy.

Even the large accounting firms are starting to see the value in offering succession planning services. In 2011, PriceWaterhouseCoopers (PWC) published an article titled, Succession Planning: What is the cost of doing it poorly ... or not at all, which presents the idea that investing the proper amount of time and effort needed to carry out a fully defined, organization-wide succession planning program is crucial, and if not, what is the true cost of bad planning? The article points out that the true question should not be how much does succession planning cost, but rather what is the cost of NOT implementing a strategic succession planning program.

PWC outlines the five elements of success very similar to the other “best practice” articles reviewed. These five elements of success are as follows:
1. Integrated into the organization’s long-term business strategy;
2. Owned by senior management;
3. Continually assess key talent;
4. Linked to other talent management processes and practices; and
5. Monitor and evaluate the performance of their succession planning efforts.

Whether one is in the private sector, government, education or offering consulting services, best practices of effective succession planning is here to stay. There are many helpful resources available; in addition to the five discussed above, and also many consulting firms that are getting into this specialty service of offering value to organizations looking for help.

Succession Planning in the Public Sector

The public sector is not that far behind the private sector in their succession planning efforts. An organization called the Corporate Leadership Council published a comparison in a white paper titled *Succession Planning in the Government Sector*. The goal of the Corporate Leadership Council was to provide a balanced review of a study topic within parameters of projects requested by members. This white paper was completed in January 2004 and profiled four organizations: (1) a typical Agency, (2) the IRS, (3) the Social Security Administration, and (4) the Western Area Power Administration. It focuses its discussion on succession planning structures and strategies used by government-sector organizations.

They highlight that succession planning should be part of a larger strategic human capital management initiative. With the profiled organizations, they find that leadership development is a specific HR function with succession planning as a centralized function. It is
part of the government’s performance appraisal process. Each profiled agency has its own
development management programs to include Emerging Leaders Program, Advance
Leadership Development Program, SES Candidate Development Program, and Evaluation of
Managerial Potential Program, which is what the IRS uses.

At the IRS, their Evaluation of Managerial Potential Program starts off with course work
of leadership curriculum classes by level within the agency. This highly centralized program is
very structured as well as tailored to managers on the front line, executive managers back in
the office, and to managers leading teams in the field.

Another article titled, *Succession Planning in Government: Why it is still relevant*, was
published in 2011 by the think-tank firm Baker Tili as part of a State and Local Government
Industry Insights series. It discusses that it was only ten years earlier when we first started
hearing about succession planning in government. They suggest it was probably due to the
anticipation of massive Baby Boomer retirements and human resource practitioners advocating
for governments to start managing their knowledge drain. The article refers to the Center for
State and Local Government Excellence (SLGE) reports of a recent study that 40% of workers
have postponed their retirement plans. This allows agencies and managers to extend their
timeline to better design succession plans.

Complicating the succession planning efforts in government, are issues such as the
perception of job security, pension reforms, reduced local revenues, and the concept of
governments doing more with less.

The article illustrates a handy succession planning toolbox. Once positions have been
identified, the competencies needed, and the gaps, then you are able to design specific
targeted strategies to ensure the gaps are filled. Most agencies seem to follow the key
strategies of training, coaching, evaluating and knowledge management principles.

The Center for State and Local Government Excellence (SLGE) national survey results,
published in 2011, showed that several states have about 50% of their state workers eligible for
retirement (Oregon shows just fewer than 10 percent).

Even medium-sized cities are appreciating the value of succession planning. There was
a case study performed on succession planning efforts by the City of Plano, Texas just outside of
Dallas. This study was titled, *Succession Planning in Government: Case Study of a Medium-Sized
City*, and published by the University of Texas in 2007. At the City of Plano the newly hired HR
Director (in 2001) recognized that Plano would be in serious trouble if all the employees that
were eligible to retire actually did retire. Back then, there were few succession planning
models in local government, so they modeled one in the private sector.

Plano implemented their first succession planning model, which included targeted
positions through a formal selection process from the city manager or other managers. They
had $15,000 budgeted to cover training and travel expenses. They targeted 30% of the
workforce focusing on managers with bachelor’s degree and 3 years of supervisory experience.
They utilize brown bag lunches, outside consultants, and position specific training courses to
mentor the future talent. Approximately 20 employees join the program each year. A
Management Preparation Assessment Team provides written feedback to each participant
relating to the 12-month curriculum.

After four years, the program continues to thrive. Participants of the program have been
promoted while others have accepted positions of greater responsibilities with other agencies.
The learning experiences they gained included underestimating the amount of formalized
structure and guidance that was needed and starting with an initial group of participants that was too large and unmanageable.

How best should the public sector implement succession planning? This question was addressed in an article titled *The Implementation of Workforce and Succession Planning in the Public Sector* and authored by Joan Pynes who is a Professor at the University of South Florida in 2004. This article’s main overall point is that in order for succession planning to succeed in government, human resource management professionals must become strategic partners with managers and develop new skills and competencies. The article examines the importance of succession planning in government and the obstacles to its implementation.

The author lays out five imperative steps in aligning human resource management to succession planning:

- **Step 1** – include HR in strategic plans;
- **Step 2** – define human resource requirements;
- **Step 3** – develop action plan for implementing human resource strategies;
- **Step 4** – evaluate progress;
- **Step 5** – manage the change process.

The challenges that governments discover include weak human resource departments, reluctance of employees to change, financial costs, and political realities. The article points out that a centralized human resource role helps implementation and guidance of succession planning. Training and development are essential to the success of any effective succession planning in government today, for both the human resource department and the organization.

Another article pointing out other opportunities and challenges for the public sector was a 2012 article titled, *A Study of the Opportunities and Challenges Facing Cities and*
Succession planning is critical in government due to shrinking workforce and the link to organizational effectiveness and planning. The International City Managers Association (ICMA) finds that 63% of city and county employees are already over age 51 compared with 8% in 1971. The article notes that the time period between the departure of a current executive and the hiring of a new executive is fraught with risks. Without succession planning in place the risk of turnover in government is high. Succession planning is particularly challenging in government because there is a perception that predetermining the best candidate for a position resembles favoritism. It is also particularly difficult to motivate managers in finding replacements due to job security and seniority issues.

With the aging of the baby boomers and the turnover of local government managers, the article points out that it presents considerable challenges to many cities and counties across the United States. Local governments will need to redefine the way they relate to their human resource departments by aligning with them as strategic business partners, to better assess their business needs.

In summary, all of these articles regarding succession planning in government highlight that succession planning should be part of a larger strategic human capital management initiative. Performed in isolation, for example, departments operating in silos, particularly in government, the outcome will likely be another policy manual binder sitting on the shelves of
government mid managers. Beyond the policy manual binder, the goal is to be an effective partner with local government managers to find solutions for their employment needs.
CHAPTER 3

Oregon Public Employees Retirement System (PERS)

Background on PERS

Oregon became a State in 1859 and the Oregon Public Employees Retirement System (PERS) was established in 1946 to help public sector employees plan for financial security after retirement from public employment. In addition to retirement benefits, PERS has provisions for death and disability benefits and for refunds of contributions to members who separate from public employment. PERS covers all state agencies, including institutions of higher education, community colleges, and all public school districts, County and city governments and political subdivisions such as rural fire districts, water districts, port districts, and others also participate in PERS.

There are approximately 885 employers with staff totals ranging from one to over 5,900 employees participating in PERS. PERS began with 18,000 participants in 1946. Since then, the system has grown to more than 322,000 members. Except in a few special cases, employees automatically participate in PERS whereas elected and appointed officials can choose whether or not to participate.

PERS administers three pension programs: Tier One, Tier Two and the Oregon Public Service Retirement Plan (OPSRP) program. New members become members of OPSRP upon completing their eligibility requirements of six months of service and 600 hours worked. New members vest after five years of 600 hours worked in each year. Members hired before 2003 are Tier One and if hired after that time they participate in Tier Two (Oregon PERS 2013). Specifically, “Tier One covers members hired before January 1, 1996; Tier Two covers members hired between January 1, 1996 and August 28, 2003; and OPSRP covers members hired on or
after August 29, 2003. The IAP [Individual Account Program] contains all member contributions (6% of covered salary) made on and after January 1, 2004.” (pers.state.or.us)

Oregon PERS in Crisis

“Nothing in PERS’ 40-year history – not even close – has matched its dismal performance during America’s severe economic downturn. By December 31, 2008, the fund – technically known as the Oregon Public Employee Retirement Fund, or OPERF – plunged 27%, finishing the year at $45.7 billion. In one year alone, 2008’s losses wiped out the previous 4 years’ of investment gains, essentially returning OPERF to within 10% of its valuation almost a decade earlier – in 1999” (Keisling 2009).

The Oregon crisis is in the form of huge increases in the amount of money that public employers must pay into the Oregon Public Employees Retirement System. PERS has to increase the contributions to make up for investment losses that occurred during the stock market recession of 2008 and again in 2012. These market downturns dug a huge hole in PERS that needs to be filled. Even though there were positive earnings in 2013, they did not make up for the loss. The vast majority of PERS employers will see a rate increase.

The increase will cost Oregon governments participating in PERS a total of more than $1 billion in additional employer pension contributions, according to information provided by PERS resulting from public-records requests. To cover these additional expenses; cuts to classrooms, parks, libraries and myriad other community services have occurred and may continue. Some local governments might lay off workers or consider other financial cuts.

All governments involved in PERS; state agencies, cities, counties, school districts, fire districts, special districts and other public entities, watch closely to see what their specific increases will be. PERS announces new rates every two years with the next increase to take
effect in July 2015. Everyone recognizes the crisis is here, but each government’s response is
different. In general, local governments such as cities and counties plan for rate increases in the
budgets they craft, even though they don’t take effect until a future year. State agencies also
are gearing up for the increases, gathering information and considering alternatives. School
districts are the hardest-hit by PERS rate increases, given how much of their budgets involve
personnel costs, and the lack of other revenue streams

PERS Retirement Benefits Calculations

PERS benefits when one retires, are actuarially determined because you will receive it
over a long period of time. Generally the formula of the benefit received equals the number of
years of service times a percentage times your final average salary. Following are descriptions
of the three methods that PERS uses to calculate a retiree’s benefit for Tier 1 members:

Formula Plus Annuity method: The part of your benefit paid from employer funds will be
reduced 8 percent for each year you are below the age of 58 (age 60 if you are a Tier Two
member and your classification is General Service, age 55 if your classification is Police & Fire).

Full Formula method: Your entire benefit will be reduced 8 percent for each year you are
below the age of 58 (age 60 if you are a Tier Two member and your classification is General
Service, age 55 if your classification is Police & Fire).

Under a Money Match retirement calculation, PERS does not apply early retirement
reduction factors that would apply under the Full Formula calculation (8 percent annually until
you reach normal retirement age). However, if you retire early under the Money Match
calculation, there is an actuarial impact because payments will be received for a longer period
since disbursements are based on life expectancy. Monthly payments will be less than they
would be if you retired at normal retirement age.
Eligibility for PERS Retirement

To be eligible to retire with PERS, one either has to have reached a certain age or have a certain amount of years contributing into the PERS system. This is important because it is the basis of how we can determine who might retire and when (Milliman 2013). The age at which you can retire depends on your classification and whether you are a Tier 1, Tier 2 or OPSRP member.

Tier 1 & 2: Retirement with unreduced benefits:

<table>
<thead>
<tr>
<th>Classification</th>
<th>Age Tier One</th>
<th>PERS Service Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Service</td>
<td>58</td>
<td>Any age with 30 years of service</td>
</tr>
<tr>
<td>Police and Fire</td>
<td>55</td>
<td>Age 50 with 25 years of service</td>
</tr>
</tbody>
</table>

Tier 1 & 2: Retirement with reduced benefits:

<table>
<thead>
<tr>
<th>Classification</th>
<th>Age Tier One</th>
<th>Age Tier Two</th>
<th>PERS Service Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Service</td>
<td>55 – 57</td>
<td>55 – 59</td>
<td>Less than 30 years of service</td>
</tr>
<tr>
<td>Police and Fire*</td>
<td>50 – 54</td>
<td>50 – 54</td>
<td>Less than 25 years of service</td>
</tr>
</tbody>
</table>

OPSRP: Retirement with unreduced benefits:

<table>
<thead>
<tr>
<th>Classification</th>
<th>Age</th>
<th>PERS Service Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>General service</td>
<td>65</td>
<td>Age 58 with 30 years of service</td>
</tr>
<tr>
<td>Police and Fire*</td>
<td>60</td>
<td>Age 53 with 25 years of service</td>
</tr>
</tbody>
</table>

OPSRP: Retirement with reduced benefits (if vested)

<table>
<thead>
<tr>
<th>Classification</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>General service</td>
<td>55</td>
</tr>
<tr>
<td>911 Operator (General Service)</td>
<td>Any age with 25 years of service</td>
</tr>
</tbody>
</table>
CHAPTER 4

Succession Planning

Succession Planning in the Public Sector

Succession planning is the process of planning for the development and placement of people in an agency (PriceWaterhouseCoopers 2006). It deals with the art and science of planning for replacements when employees depart – the culmination of a process of identifying talent early and cultivating it through training, action learning, mentoring, job rotation, and high potential development programs. It is a process sustained by performance evaluation systems that track and evaluate employees to prepare agencies to fill vacancies when they occur.

Successful succession planning is very difficult for government agencies to achieve because they have distinctive leadership and management needs at all levels of government. Even if replacement talent is available, they may not have the appropriate skills. In addition to demographics and logistical obstacles, the government faces a series of other fundamental obstacles to effective succession planning.

Lingering distrust and lack of interest in pursuing a career in government reduce the available supply of replacement talent as the population often chooses other professions. Government employees typically are paid much less than in the private sector. Government regulations make hiring and personnel management rules more difficult and lengthy career paths are perceived to be too slow as compared to the private sector. Given these additional
challenges to succession planning in the public sector, it is all the more important to understand which professions will be needed the most in the future and which talent pools government agencies should be focusing on today.

**Public Employers Need to Train For the Future**

PERS has three basic challenges. PERS rates are increasing every two years and becoming harder and harder for many entities to keep up with the increasing costs. The longer an employee works the higher their eventual pay out from the PERS system. PERS has assumed certain specific requirements for eligibility for retirement and when most will retire, which is not actually what is happening. Public employees are staying longer. Did the founders of the PERS system and the actuaries miscalculate the effects of these three challenges and benefits paid out to the retirees?

**Public Employers Need to Plan for Upcoming Retirements**

Public Employers need to identify potential retirees and develop plans for replacing them with employees possessing the needed skills. Those skills may be the same skills as currently being performed or may be updated with the changing needs of the organization and availability of fresher technology. Public employers need to take action to ensure they continue providing the necessary and expected public services. Public employers also must address the brain drain and ensure effective governance.

**Putting Oregon Back to Work**

Governor Kitzhaber delivered a powerful charge to State and local workforce partners: Build a sustainable, systemic approach to workforce development that produces a highly-skilled workforce, advances more people into family wage jobs, and helps our businesses and workers
succeed in a fundamentally transformed economy. The Governor challenged us to coordinate the development of that system (Oregon Workforce Partnership 2013).

This partnership was created understanding that Oregonians need to have the skills necessary to achieve individual prosperity and Oregon businesses need to have the skilled workforce they need to compete and prosper in the global market.

The Oregon Workforce Partnership (OWP) is a non-partisan, private/public, statewide association committed to building a more highly skilled workforce to support and expand Oregon’s economy. OWP is driven by the leadership of 120 local businesses, investing their resources to better align economic, education and training systems for job creation and greater prosperity. In the Fall 2012, OWP identified where the greatest number of job vacancies are (Exhibit #5) and although the top categories are not in government, government jobs still show vacancies. The challenge for both businesses and government is to train our future talent to fit into those areas where the need is greatest – let’s get Oregon back to work! The end game of the OWP is to ensure that there are appropriately trained workers that will fulfill the needed jobs that our Oregon businesses require in the future. How they know what those needed jobs are, is by receiving information as a result of succession planning efforts that Oregon businesses will provide to them.
CHAPTER 5

Analysis of Oregon Government Workers Eligible for PERS

Research Design and Data Collection

My research data was gathered from Oregon PERS employers in determining the extent of the concerns about the number of retirees and the impact on their organizations. The determining factors were employee’s age in comparison to their eligibility to retire, length of service, job title and PERS tier category. Current retirement age and other requirements for Tier 1, Tier 2 and OPSRP were used to identify the potential vacancies by position within the State, counties, cities, education and special districts. Each sector has significantly different needs. Public Safety has different retirement requirements and will be addressed separately as well. A summary of this data collected is presented in Exhibit 7 attached.

PERS retirement data was analyzed in conjunction with the data received from the employers. The PERS data did not include job titles. It was valuable in determining the number of eligible retirees, but succession planning requires position information to identify specific job classes that will need to be filled. Accordingly, my survey responses received from the employers included over 16,000 positions or about five percent of the approximate 300,000 Oregon PERS participants. This makes my survey data fairly representative of the entire population.

I then studied the retirement trends, looking at the expected baby boomer wave of retirements. This great wave has not occurred as was predicted. Why not? What criteria are future retirees analyzing to determine the perfect time to retire? People are living longer, is there a concern that their retirement funds will not last as long? Is the PERS retirement
calculation playing a role? Are there fewer employees to step up and fill those shoes? Have reductions of middle management affected the availability for these opportunities?

Oregon PERS employers are similar to other public employers across the country. Where possible, this data was compared with that available on a national level. Retirement trends within the public sector and opportunities to fill positions with internal or external resources were analyzed. As public employers struggle with sufficient revenues to provide services, will attrition of retirees be expected to ease budget constraints? PERS rules allow for retirees to continue working as half time employees, not to exceed 1039 hours per year. Can this be used as a benefit for the public employers to extend the time needed to find replacement staff?

Through long-range succession planning, government agencies can groom employees to move up to higher levels within the organization and to take over for director-level positions by becoming actively involved in the day-to-day operations of their departments.

The public sector needs to look at their current staffing – if your City Manager and Assistant City Manager are both in their late 50’s for example, you may need to look further down the organizational ladder to find potential successors. Organizational philosophy, regarding hiring from outside or promoting from within, needs to be addressed and acknowledged. Younger employees may not stay to wait for their chance to be promoted if the choice director-level positions are always filled from external recruitments.

**Analysis of Information from PERS**

Information received from PERS, as illustrated in Exhibits 2 and 3, tell us that they estimate 10 to 20 percent of eligible employees will retire after the age of 50. However, this is based upon historic trending and with the largest generation, the baby boomer generation in this age range, the actual retirements will increase imminently. Additionally, PERS specifically
projects with Exhibit 3 that the bulk of the future liability of payments stems from the older
generation of workers (i.e. Tier 1) and not the newer generation of incoming public sector
employees. With this unfunded liability projected to rise over the next twenty years, rates and
hence the cost that public employers pay into PERS will only increase. All the more need for
proper succession planning so that we are replacing and training future workers with a focus on
which positions will be retiring the most.

Analysis of Information from Oregon WorkSource

Information received from the Oregon WorkSource, as illustrated in Exhibits 4 through
6, tell us that there is a leadership pipeline of training needed, as well as where job vacancies
currently stand. Specifically with Exhibit 6, they graph the baby boomers rising ages and
projected retirement ages. This shows that the mean age is projected to increase substantially
and overcome the standard age of retirement of 65 sometime in the next twenty years.

With the current trending of aging baby boomers and rising PERS costs, this is all the
more reason that succession planning for specific position types is so important. Accordingly,
my survey requests of Oregon HR Directors focused on receiving job title data and compare and
contrast with that of PERS retirement data.

Analysis of Information from Oregon HR Directors

As a result of my email request to Oregon HR Directors (Exhibit 1), I received data for
over 16,000 positions. With this information, I created pivot tables to analyze the information
in numerous ways. Then I created a statistical results section of this data (Exhibit 7) to
summarize all of this information. I was able to get the data by PERS Status, age, years of
service, Tier and, most important, by Position. By having all of this information, I am able to
sort by Position Type and determine along with the employee’s age, when they would be
eligible to retire. As of today (Exhibit 8), 20% of Police and Fire employees and 32% of General Service employees are already eligible to retire at any time. Hence, roughly 1/3 of Oregon government employees can leave service at any time. The data also shows us however, that many eligible employees continue to work after they initially become eligible. Both of these facts further strengthen the need for targeted succession planning.

Analysis of 5 Years and 10 Years Out

Exhibit 9 is the heart of my survey results. This table shows not only today’s eligible retirees, but also which ones will be eligible 5 years and 10 years from today. This particular table has the added component we cannot get from PERS, the Position Type. Overall, 60% of today’s government workers are eligible to retire within the next 10 years (refer to pie chart in Exhibit 10 and % stacked-bar graph in Exhibit 12). The positions where we see the fewest eligible as a percentage of total employment in that same Position Type, are Parks & Recreation, Health & Human Services, and Human Resources at around 50% being eligible in the next 10 years. This makes sense, especially with Parks & Rec. as this career choice attracts more active and younger employees.

The positions in the categories of Public Works, Administration, Police & Fire are over 60 percent eligible within the next 10 years. Accordingly, our succession plans need to have an added focus in these areas. Exhibit 11 actually shows the numbers of eligible by Position Type of which Police & Fire and Administration position clearly outnumber the other positions. This is why we are encouraging our children to pursue a Fire career. Keep in mind, that educational institutions should also be developing programs in these areas as well to fill this projected employment gap today and ten years out.
CHAPTER 6

Conclusion

This final reflective paper does prove that a greying of public employees in Oregon does exist. Within the next 10 years, the impact of the retiring Baby Boomers will materialize and, unless targeted succession planning efforts in Oregon’s governmental agencies are successful, a tsunami wave will soon hit. This paper demonstrates the impact that the sheer numbers of retirees will have on the functioning of the State, counties, cities and special districts in Oregon; moreover it shows it by Position Type. As many retire, our governmental agencies lose historic perspective and much of their needed knowledge base. Planning for the future can prepare the public sector for the eventual retirements, and development of succession planning policies can ensure sufficient staffing levels in the future. Furthermore, planning for this transition can help us identify the changing workforce needs within Oregon public sector.
References


References (continued)


Exhibit #1

Email Request to Oregon HR Directors at PERS Public Agencies

February 28, 2014

Dear HR Director,

I am a graduate student at Portland State University in the Executive Masters of Public Administration program. My capstone project will link Public Sector PERS retirement eligibility in the State of Oregon in the next five years to succession planning needs. I have narrowed this study down to PERS employees due to the significant amount of retirement data available from PERS. Reaching out to individual organizations like yours will supplement the public records data from PERS, which unfortunately does not include job titles.

I am requesting the following information for your active employees:

1. Job Title
2. Age (for example 42, not a birthdate)
3. Length of service at your organization (for example 7, meaning 7 years)
4. PERS status (active PERS, returning retiree or non PERS)
5. PERS Tier Level (Tier 1, Tier 2, OPSRP or not applicable, if they do not qualify)

Please note, I am not requesting any specific names or birthdates nor will I be analyzing or displaying results based on any one specific job title or entity, but rather on groupings of type of job categories for example: Finance/Accounting, Police, Teachers, Administrative, Public Works, etc. If you feel more comfortable with job type categories instead of exact job title, I would welcome that information in lieu, for example instead of Police Chief, Police and instead of Administrative Assistant to Police Chief, Administrative.

I appreciate your assistance in providing this information. If you are interested in a copy of the final report, please let me know and I will be happy to provide a final copy electronically to you. Please feel free to contact me if you have any questions regarding the information requested.

Please email your data to me as soon as you can but no later than Monday, March 31, 2014. A blank template is attached for your convenience, that includes formulas to convert date of birth to current age and date of hire to length of service.

Thank you,

Michaelyn Seals, PHR CPP
Graduate Student at Portland State University
Executive Masters of Public Administration
Center for Public Service, Hatfield School of Government
and HR Analyst II at Washington County Oregon
Exhibit #2

PERS Rates of Retirements

<table>
<thead>
<tr>
<th>Age</th>
<th>Police &amp; Fire</th>
<th>General Service</th>
<th>School Districts</th>
<th>General Service (Including School Districts)</th>
<th>Judges</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>&lt; 13 yrs</td>
<td>13-24 yrs</td>
<td>25+ yrs</td>
<td>&lt;15 yrs</td>
<td>15-29 yrs</td>
</tr>
<tr>
<td>Less than 50</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50</td>
<td>1.00%</td>
<td>1.50%</td>
<td>20.00%</td>
<td>1.00%</td>
<td>2.50%</td>
</tr>
<tr>
<td>51</td>
<td>1.00%</td>
<td>1.50%</td>
<td>14.00%</td>
<td>1.00%</td>
<td>2.50%</td>
</tr>
<tr>
<td>52</td>
<td>1.00%</td>
<td>1.50%</td>
<td>14.00%</td>
<td>1.00%</td>
<td>2.50%</td>
</tr>
<tr>
<td>53</td>
<td>1.00%</td>
<td>1.50%</td>
<td>14.00%</td>
<td>1.00%</td>
<td>2.50%</td>
</tr>
<tr>
<td>54</td>
<td>1.00%</td>
<td>1.50%</td>
<td>14.00%</td>
<td>1.00%</td>
<td>2.50%</td>
</tr>
<tr>
<td>55</td>
<td>2.00%</td>
<td>7.00%</td>
<td>20.00%</td>
<td>1.00%</td>
<td>2.50%</td>
</tr>
<tr>
<td>56</td>
<td>2.00%</td>
<td>7.00%</td>
<td>20.00%</td>
<td>1.00%</td>
<td>2.50%</td>
</tr>
<tr>
<td>57</td>
<td>2.00%</td>
<td>7.00%</td>
<td>20.00%</td>
<td>1.00%</td>
<td>2.50%</td>
</tr>
<tr>
<td>58</td>
<td>2.00%</td>
<td>7.00%</td>
<td>20.00%</td>
<td>1.00%</td>
<td>8.00%</td>
</tr>
<tr>
<td>59</td>
<td>2.00%</td>
<td>7.00%</td>
<td>20.00%</td>
<td>1.50%</td>
<td>8.00%</td>
</tr>
<tr>
<td>60</td>
<td>5.00%</td>
<td>10.00%</td>
<td>20.00%</td>
<td>4.00%</td>
<td>8.00%</td>
</tr>
<tr>
<td>61</td>
<td>2.00%</td>
<td>13.00%</td>
<td>20.00%</td>
<td>4.00%</td>
<td>8.00%</td>
</tr>
<tr>
<td>62</td>
<td>15.00%</td>
<td>20.00%</td>
<td>35.00%</td>
<td>8.50%</td>
<td>16.00%</td>
</tr>
<tr>
<td>63</td>
<td>7.00%</td>
<td>18.00%</td>
<td>25.00%</td>
<td>8.00%</td>
<td>14.50%</td>
</tr>
<tr>
<td>64</td>
<td>7.00%</td>
<td>10.00%</td>
<td>15.00%</td>
<td>8.00%</td>
<td>13.00%</td>
</tr>
<tr>
<td>65</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>14.00%</td>
<td>22.00%</td>
</tr>
<tr>
<td>66</td>
<td></td>
<td></td>
<td></td>
<td>19.00%</td>
<td>31.00%</td>
</tr>
<tr>
<td>67</td>
<td></td>
<td></td>
<td></td>
<td>15.00%</td>
<td>22.00%</td>
</tr>
<tr>
<td>68</td>
<td></td>
<td></td>
<td></td>
<td>15.00%</td>
<td>22.00%</td>
</tr>
<tr>
<td>69</td>
<td></td>
<td></td>
<td></td>
<td>15.00%</td>
<td>22.00%</td>
</tr>
<tr>
<td>70</td>
<td></td>
<td></td>
<td></td>
<td>15.00%</td>
<td>22.00%</td>
</tr>
</tbody>
</table>

Observation:
The above table shows the retirement trending by percentage and by age. On average, 20% of Police & Fire as well as General Service retire each year, on average.
Observation:
The above chart illustrates that the bulk of the future liability of payments stems from the older generation of workers (i.e. Tier 1) and not the newer generation of incoming public sector employees.
**Exhibit #4**

**Succession Planning Pipeline Characteristics**

**Observation:**
The above diagram illustrates that proper succession planning in leadership should have a talent pipeline always pumping potential employees through the system.
Exhibit #5

Job Vacancies by Type (Fall 2012)

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Vacancies</th>
<th>Full-time Positions</th>
<th>Permanent Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Occupations</td>
<td>31,230</td>
<td>74%</td>
<td>82%</td>
</tr>
<tr>
<td>Heavy and Tractor-Trailer Truck Drivers</td>
<td>1,461</td>
<td>93%</td>
<td>99%</td>
</tr>
<tr>
<td>Personal Care Aides</td>
<td>1,210</td>
<td>51%</td>
<td>98%</td>
</tr>
<tr>
<td>Customer Service Representatives</td>
<td>1,095</td>
<td>90%</td>
<td>68%</td>
</tr>
<tr>
<td>Retail Salespersons</td>
<td>1,058</td>
<td>47%</td>
<td>43%</td>
</tr>
<tr>
<td>Automotive Service Technicians and Mechanics</td>
<td>762</td>
<td>98%</td>
<td>100%</td>
</tr>
<tr>
<td>Construction Laborers</td>
<td>717</td>
<td>100%</td>
<td>65%</td>
</tr>
<tr>
<td>Registered Nurses</td>
<td>651</td>
<td>68%</td>
<td>96%</td>
</tr>
<tr>
<td>Nursing Assistants</td>
<td>640</td>
<td>60%</td>
<td>98%</td>
</tr>
<tr>
<td>Cashiers</td>
<td>536</td>
<td>27%</td>
<td>40%</td>
</tr>
<tr>
<td>Computer User Support Specialists</td>
<td>490</td>
<td>99%</td>
<td>99%</td>
</tr>
<tr>
<td>Amusement and Recreation Attendants</td>
<td>488</td>
<td>51%</td>
<td>0%</td>
</tr>
<tr>
<td>Preschool Teachers, Except Special Education</td>
<td>462</td>
<td>18%</td>
<td>92%</td>
</tr>
<tr>
<td>Stock Clerks and Order Fillers</td>
<td>428</td>
<td>75%</td>
<td>36%</td>
</tr>
<tr>
<td>Receptionists and Information Clerks</td>
<td>412</td>
<td>71%</td>
<td>86%</td>
</tr>
<tr>
<td>Sales Representatives, Wholesale and Manufacturing, Except Technicians</td>
<td>402</td>
<td>98%</td>
<td>100%</td>
</tr>
<tr>
<td>Hairdressers, Hairstylists, and Cosmetologists</td>
<td>380</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Bus Drivers, School or Special Client</td>
<td>380</td>
<td>1%</td>
<td>88%</td>
</tr>
<tr>
<td>Physical Therapists</td>
<td>325</td>
<td>77%</td>
<td>100%</td>
</tr>
<tr>
<td>Laborers and Freight, Stock, and Material Movers, Hand</td>
<td>323</td>
<td>66%</td>
<td>58%</td>
</tr>
<tr>
<td>Teacher Assistants</td>
<td>264</td>
<td>19%</td>
<td>87%</td>
</tr>
<tr>
<td>Counter and Rental Clerks</td>
<td>261</td>
<td>43%</td>
<td>12%</td>
</tr>
<tr>
<td>Secretaries and Administrative Assistants, Except Legal, Medical, and Executive</td>
<td>249</td>
<td>99%</td>
<td>100%</td>
</tr>
<tr>
<td>Production Workers, All Other</td>
<td>247</td>
<td>98%</td>
<td>81%</td>
</tr>
<tr>
<td>Accountants and Auditors</td>
<td>246</td>
<td>80%</td>
<td>81%</td>
</tr>
<tr>
<td>Home Health Aides</td>
<td>245</td>
<td>87%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Observation:
The above table lists the current job vacancies as tracked by the Oregon Employment Department. Most of these positions are private sector, but some overlap into public sector.
Exhibit #6

**Older Population Projected to Double as a Percentage**

**What Baby Boomers’ Retirement Really Means For the U.S. Economy**
FiveThirtyEight

---

**Projected U.S. Population Growth**
Percentage change from 2012

![Graph showing projected U.S. population growth for different age groups from 2015 to 2060.](source: U.S. Census Bureau)

**Observation:**
The above diagram illustrates the growing percentage of baby boomers are exceeding the standard 65 retirement age.
### Exhibit #7

#### Summary Data Collected (with and without Education)

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Job Type</th>
<th>Age</th>
<th>Years of Serv</th>
<th>PERS Stat</th>
<th>PERS Tier</th>
<th>PERS Category</th>
<th>Entity</th>
<th>Type of Entity</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUBSTITUTE BUS DRIVER</td>
<td>Transportation</td>
<td>60.97</td>
<td>0.01</td>
<td>Active</td>
<td>OPSRP</td>
<td>OPSRP</td>
<td>Salem Keizer School District Education</td>
<td></td>
</tr>
<tr>
<td>Bus Driver</td>
<td>Transportation</td>
<td>56.84</td>
<td>0.08</td>
<td>Retired</td>
<td>Tier 1</td>
<td>General Service</td>
<td>Portland Public Schools Education</td>
<td></td>
</tr>
</tbody>
</table>

| Count totals of raw data = 16,736 | 16,736 | 16,736 | 16,736 | 16,736 | 16,736 | 16,736 |

| Number of "Administration" = 2,314 | 14%   | No. of "Active" = 15,647 | 93% |
| Number of "Building" = 115 | 1%   | No. of "Retired" = 1,089 | 7%  |
| Number of "Corrections" = 541 | 3%   |                               |     |
| Number of "Elected Official" = 10 | 0%   | Number of "Tier 1" = 4,254 | 25% |
| Number of "Engineer" = 164 | 1%   | Number of "Tier 2" = 3,665 | 22% |
| Number of "Facilities" = 743 | 4%   | Number of "OPSRP" = 8,816 | 53% |
| Number of "Finance" = 347 | 2%   |                               |     |
| Number of "Fire" = 540 | 3%   | Number of "General Service" = 15,284 | 91% |
| Number of "Health & Human Services" = 1,930 | 12% | Number of "OPSRP" = 55 | 0% |
| Number of "Human Resources" = 95 | 1%   | Number of "Police & Fire" = 1,393 | 8%  |
| Number of "Information Technology" = 245 | 1%   | Number of "Elected Officials" = 4 | 0%  |
| Number of "Legal" = 182 | 1%   |                               |     |
| Number of "Library" = 335 | 2%   | Number of "City" = 1,065 | 6%  |
| Number of "Parks & Rec" = 132 | 1%   | Number of "County" = 3,854 | 23% |
| Number of "Planner" = 121 | 1%   | Number of "Special District" = 456 | 3%  |
| Number of "Police" = 728 | 4%   | Number of "Education" = 11,281 | 67% |
| Number of "Public Works" = 421 | 1%   |                               |     |
| Number of "Teacher" = 7,448 | 45%  |                               |     |
| Number of "Transportation" = 325 | 2%   |                               |     |
Exhibit #8

Current Oregon Government Employees Already Eligible to Retire Today

<table>
<thead>
<tr>
<th>Summary of Results by PERS Category</th>
<th>Already eligible to retire with full PERS benefits</th>
<th>Already eligible to retire with reduced PERS benefits</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>POLICE &amp; FIRE:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Police &amp; Fire sampled</td>
<td>1,393 100%</td>
<td>1,393 100%</td>
<td>1,393 100%</td>
</tr>
<tr>
<td>Less already eligible to retire based on age</td>
<td>129 9%</td>
<td>117 8%</td>
<td>246 18%</td>
</tr>
<tr>
<td>Less already eligible to retire based on age and years</td>
<td>36 3%</td>
<td>0%</td>
<td>36 3%</td>
</tr>
<tr>
<td>Less total eligible to retire</td>
<td>165 12%</td>
<td>117 8%</td>
<td>282 20%</td>
</tr>
<tr>
<td>Not eligible</td>
<td>1,228 88%</td>
<td>1,276 92%</td>
<td>1,111 80%</td>
</tr>
</tbody>
</table>

* 1/5 of Police & Fire can retire with Full or Reduced PERS today.

| **GENERAL SERVICE:**              |                                               |                                                  |       |
| Total General Service sampled     | 4,062 100%                                    | 4,062 100%                                       | 4,062 100% |
| Less already eligible to retire based on age | 885 22%                                       | 377 9%                                           | 1,262 31% |
| Less already eligible to retire based on age and years | 34 1%                                         | 0%                                                | 34 1% |
| Less total eligible to retire      | 919 23%                                       | 377 9%                                           | 1,296 32% |
| Not eligible                       | 3,143 77%                                     | 3,685 91%                                        | 2,766 68% |

** 1/3 of General Service employees can retire with Full or Reduced PERS today.

| **TOTAL:**                         |                                               |                                                  |       |
| Total government employee positions sampled | 5,455 100%                                    | 5,455 100%                                       | 5,455 100% |
| Less already eligible to retire based on age | 1,014 19%                                      | 494 9%                                           | 1,508 28% |
| Less already eligible to retire based on age and years | 70 1%                                         | 0%                                                | 70 1% |
| Less total eligible to retire      | 1,084 20%                                     | 494 9%                                           | 1,578 25% |
| Not eligible                       | 4,371 80%                                     | 4,961 91%                                        | 3,877 71% |

*** 30% of all government employees can retire with Full or Reduced PERS today.

Observation:
The above table is a summary of my survey data. It summarizes the percentage of eligible retirees for both full PERS benefits as well as reduced PERS benefits.
Observation:
The above table summarizes the heart of my survey data. It shows, by Position Type, who is eligible today, in 5 years and in 10 years.
Exhibit #10

Current Oregon Employees Eligible to Retire over the next 10 Years

**Observation:**
The above pie-chart illustrates the percentage of PERS employees that eligible today, in 5 years and in 10 years.
Observation:
The above stacked bar graph illustrates the number PERS employees that are eligible today, in 5 years and in 10 years as compared to each other.
Exhibit #12

Percentage of Current Oregon Employees Eligible to Retire over the next 10 Years, by Position Type

Observation:
The above % stacked bar graph shows the percentage of PERS employees that eligible over the next 10 years as a percentage to those who are not eligible, and again, by Position Type.