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Retention of Institutional Memory Amidst the Generational Shift in Higher Education

Michelle L. Newman
Walden University

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Walden University

College of Management and Technology

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Michelle L. Newman

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Walden University
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Abstract

Retention of Institutional Memory Amidst the Generational Shift in Higher Education

by

Michelle L. Newman

MA, American Military University, 2009

BA, George Mason University, 1995

Dissertation Submitted in Fulfillment
of the Requirements for the Degree of
Doctor of Philosophy
Management

Walden University

November 2021

Abstract

Retirement of baby boomers results in institutional knowledge loss and gaps in business continuity. The specific management problem is that managers in American higher education institutions have challenges maintaining business continuity as they lose institutional knowledge when baby boomers retire and millennials assume those positions. The purpose of this qualitative case study was to explore how organizational managers in online universities are transferring tacit knowledge from the retiring baby boomers to their millennial replacements to maintain business continuity. The conceptual framework of this study was based on Bridges's model on transition to capture the effects of the generational changes occurring in the workforce. The overarching research questions focused on how managers in an online higher education institution manage knowledge to transfer to new managers and support business continuity for their institution. Data were collected through interviews and documents from 20 baby boomers, Gen Xers, and millennial managers employed with the institution for at least three years. Yin's five steps for qualitative data analysis and thematic coding were used to identify three key findings. One finding suggested that knowledge management should be a strategic priority, supported by institutional technology systems, procedures, and policies. Another finding identified the importance of succession planning and knowledge sharing to support business continuity through change and transition. This research study could lead to positive social change by aiding universities to prepare for future workforce changes by developing strategies to retain tacit knowledge, which will support business continuity efforts and allow them to support the communities they serve.

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Dedication

This study is sincerely dedicated to my family. My parents, Robert and Barbara Jean Newman, continually show their love, support, and encouragement have allowed me to set and achieve my aspirational goals. I learned from them that I should dream big, work hard, and watch God work. My daughter, Nichella Scanlan, and son-in-love, Jacob Scanlan, and their family for the support and reminder that this work is to support future generations, not just for myself. Seeing and hearing my grandchildren, Nikolas, Joziah, and Kyarra, share their dreams and future aspirations helped me focus on completing this work and my purpose. My brother, Emmanuel Newman, for his support and encouragement during the rough times when the tasks seemed insurmountable. Lastly, I dedicate this to my late eldest brother Erik Newman. You knew before anyone else that I would finish this work; I know that you are looking down from heaven smiling proudly.

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Chapter 1: Introduction to the Study

The exodus of baby boomer managers in management positions is leaving knowledge gaps in higher education institutions (Au-Yong-Oliveira et al., 2018; Barton, 2019; Zentner, 2018). An aging workforce, new employment opportunities that cause talent to relocate, and economic factors that limit competitiveness are just a few of the concerns of managers. Institutions of higher education are similar to corporate organizations in that both are seeing large scale retirements of baby boomers (Harrison, 2017). A concern of organizations experiencing this change relates to the management of knowledge and ensuring business continuity as tenured employees retire.

The generational shift has been occurring for some time, and in 2016, the millennial population officially became the largest generational cohort (Fry, 2018b). Whereas baby boomers have a high level of organizational commitment, the same is not true for members of the millennial cohort (Tulgan, 2016). To retain millennials, organizations must help them develop their skills (Harrison, 2017). Knowledge management strategies that support the transfer of knowledge and development of skills will support personnel retention strategies that aid business continuity efforts during this transitional period (Hillman & Wernert, 2017). Ensuring higher education organizations have strategies in place for knowledge management ensures their viability for the generational shift and any additional changes that occur in the future.

The potential social implications of this qualitative case study are to expose strategies higher education institutions can use to maintain their viability in the future. Chapter 1 includes an introduction to the study, problem statement, purpose, research

questions, conceptual framework, nature of the study, definitions of terms, assumptions, scope and delimitations, limitations, and the significance of the study.

Background of the Study

The baby boomer generation comprised the largest age group in the workforce until 2016, when members of the millennial generation assumed that position. The baby boomers started exiting the workforce in 2009 (Dwyer & Azevedo, 2016). Until recently, most industries felt the transition between generations, except higher education.

According to the study published by CUPA-HR (Kline, 2019), the average age of senior administrators in higher education institutions was 60; therefore, it is likely the senior management of many higher education institutions will change over the next decade.

Now that the millennial generation is the largest in the workforce, talent management strategies are critical to attracting the right employees for the organization (Glazer et al., 2019; Muriithi & Makau, 2017). In 2020, the oldest millennial was 39 years of age, and many are already working in lower or middle management roles. The Gen X generational cohort is significantly smaller than the boomer and millennial cohorts; therefore, they will not be able to fill all the management roles that will become available as the boomers retire. Meng et al. (2017) called for organizations to attract and retain top talent regardless of their generation, stating organizations need to provide incentives, including development opportunities. Members of the millennial generation, of course, want compensation for their work. However, along with compensation, there are other expectations, such as promotion opportunities, development of new skills, engagement, and collaboration in the work environment (Bartz et al., 2017). There is an

opportunity to develop millennials for management positions and to have them take on additional responsibilities as a strategy to retain and promote employees.

As the organizational workforce changes, knowledge gaps emerge. Managing knowledge in an organization is critical to organizational success (Lehman, 2017). Higher education institutions routinely use this process as they educate their student body in the various academic subjects they offer. It takes a great deal of knowledge to manage a university. While they are professionals at creating knowledge, most do not have a consistent, organized knowledge management program to capture organizational knowledge (Petrova et al., 2015). Consistently managing knowledge is vital for the viability of the management of institutions.

An organization must also focus on both employee retention and professional development. The baby boomer generation had a great deal of loyalty to their employers, whereas the millennial generation does not show that same sense of loyalty (Kuhl, 2014; Riggs, 2017). Retention of millennial employees will be a challenge for managers in higher education if they do not provide additional benefits that support their career development (Rudhumbu & Maphosa, 2015). Academic organizations have historically used recruiters to perform national searches to fill vacancies for senior leaders because there is a feeling that internal candidates are not able to appease the various stakeholders (Lapovsky, 2006). This precedent decreases the appeal of succession planning as a viable option for higher education institutions. However, the valuable investment made in personnel means organizations cannot afford to lose employees.

Although several researchers have addressed knowledge management strategies during the generational shift in various industries, none have specifically investigated strategies at an online university or higher education. There is also little research on knowledge management strategies at universities; recent studies by Petrova et al. (2015) and O'Reilly et al. (2019) were used to build the foundation for this study. This study is timely because baby boomers are retiring at a high rate and hold tacit knowledge organizations need to capture.

Problem Statement

The workforce continues to change as members of the baby boomer generation leave their roles at a high rate as most are approaching or at retirement age (Harrison, 2017; Hoyle, 2017). For years, the baby boomer generation has been the predominant age group in the workforce. However, as of 2016, the millennial generation became the largest age group in the workforce (Fry, 2018b). As baby boomers leave, their responsibilities transfer to those who remain, often without the nuances that come from years of experience. The general management problem is the exodus of the baby boomer generation is causing a knowledge gap that interrupts business processes (Lehman, 2017).

Managers in higher education organizations are transitioning into retirement; therefore, capturing their tacit knowledge should be a strategic priority. Gen Xers and millennials are in entry and middle management roles but are often doing so without the benefit of tacit knowledge of the retiring workforce (Petrova et al., 2015). Managing institutional knowledge through the generational shift while retaining employees is a critical area of concern for managers in higher education institutions (Dwyer & Azvedo,

2016; Hillman & Werner, 2017). The specific management problem is managers in higher education institutions are having challenges maintaining business continuity as they lose institutional knowledge as baby boomers retire and millennials assume those positions (Barton, 2019; Hillman & Werner, 2017; Kuhl, 2014).

Purpose of the Study

The purpose of this qualitative case study was to explore how organizational managers in online universities were transferring tacit knowledge from the retiring baby boomers to their millennial replacements to maintain business continuity. Incorporating knowledge management strategies is critical for future managers who do not have the background and context around previous decisions and the strategic initiatives of the institution (O'Reilly et al., 2019). Data were collected through semistructured interviews of university managers of an online university to analyze strategies in use for knowledge retention and business continuity as millennials move into new management positions.

Research Questions

For this explanatory case study, I developed the following research questions to understand what strategies are in use across the institution:

RQ1: How are managers in online higher education institutions capturing and retaining the tacit knowledge of baby boomers before they retire?

RQ2: How are managers in online higher education institutions ensuring business continuity as baby boomer managers retire?

Conceptual Framework

Concepts explored in this study included knowledge management strategies, knowledge transfer, professional development strategies, talent management strategies, generational characteristics, business continuity, and the usage of all these in higher education institutions to prepare millennial employees as managers. The conceptual framework of this study was based on Bridges's (2009) model on transition to capture the effects of the generational changes occurring in the workforce. Transition is a psychological process people (organizations) go through when change occurs (Bridges, 2009). Bridges's model identifies three stages of transition: (a) ending, (b) neutral zone, and (c) the new beginning. As the workforce shifts due to the stage of life changes occurring with each generation, a transition occurs that impacts organizational operations, outcomes, and success. The three stages in the model aid in explaining the changes the organization and employees experience through this generational shift in the workforce.

The model and concepts work collaboratively as the organization and its employees go through each of the transitional stages. During the ending phase, the organization realizes the workforce changes. In the neutral zone, the organization implements the development and implementation of knowledge management and talent management strategies. Finally, in the new beginning, millennial employees are engaged in their new roles and responsibilities as the baby boomers have left the organization. As Bridges (2009) stated, "Letting go, repatterning, and making a new beginning reorients and renews people when things are changing all around them" (p. 9). Hence, aligning the

concepts to the model phases helps to establish the basis of the study to answer the research questions.

Nature of the Study

The nature of this study was to understand knowledge management strategies for managers at an online university. According to Stake (1995), “the case is a specific, complex, functioning thing” (p. 3). The identified online university is experiencing a change in its workforce due to retirements impacting the ecosystem of the organization. The institution has a management pool of approximately 200. An email was sent to the management pool soliciting 20 to 30 participants. Yin (2018) shared the desired result of a case study interview is a robust dialogue. I conducted data collection through semistructured interviews with managers to capture the activities in place to manage institutional knowledge and retain and prepare their millennial employees for management positions. Additionally, participants submitted documents such as standard operating procedures or training materials that support their responses to the interview questions.

In case study research, data analysis is an iterative process because the evaluation of the data is continuous throughout the collection process (Hancock & Algozzine, 2017). After each interview, I coded the data using NVivo 12 software and identified findings from the interview notes. I used logic models to explain how the themed activities connect as triggers throughout the transition between the retiring employees and those remaining in the organization. Yin (2018) identified the investigation of a theory of change as one use of logic models. In this study, I explored how organizational managers

in online universities are transferring tacit knowledge from the retiring baby boomers to their millennial replacements to maintain business continuity. I identified the strategies the online university used during this period of change in the workforce. After careful consideration, a single case study approach was the best choice for this research study. I chose a single case study design because I sought to understand the experience in one organization via the perspectives of those affected and artifacts developed in the organization. In the study, I aimed to determine the process the organization is using based on the managers' perceptions and their collective experiences.

Definitions

Baby boomer: A person who was born between 1945 and 1964 during the baby boom period after World War II (Fry, 2018a).

Business continuity: An organization's plan that documents the critical processes, functions, and personnel needed to run the business in cases of emergency or organizational change (Fisher et al., 2017).

Generational cohort: Groups of people born in the same date range who share similar cultural experiences (Ozkan & Solmaz, 2015).

Institutional knowledge: Information unique to an organization that may be captured as explicit or tacit knowledge (Davenport & Prusak, 1998; O'Reilly et al., 2019).

Knowledge management: The process of creating, retaining, transferring, using, and reusing information (Lehman, 2017).

Millennial: A person born between 1981 and 1995 during a time of great technological advancement (Fry, 2018a); also known as Generation Y.

Professional development: Organizational programs to develop personnel, stay competitive, retain employees, and create a flexible organizational culture of investment in their employees (Fried, 2015).

Talent management: The process an organization uses to recruit, hire, develop, and retain personnel (Krishnan & Scullion, 2016; Rudhumbu & Maphosa, 2015).

Assumptions

This study has five fundamental assumptions. I assumed participants had a concern about how the organization manages knowledge. I assumed participants would understand the research questions and would share their experiences during the interview process. I also assumed managers across the institution had experienced knowledge lost due to baby boomer retirement and could speak about the strategies their functional area uses to manage knowledge. An additional assumption was there were not consistent knowledge management practices and resources across the institution. Lastly, I assumed the participants would have the proper experience to be able to speak to the topics outlined in the study.

Scope and Delimitations

The intended scope of this qualitative case study was to understand how the institution was managing knowledge as baby boomers retire, transferring knowledge to millennials who are assuming their roles. The choice of participants included managers who were members of the baby boomer generation, members of the millennial

generation, and those who were managing members of either generational cohort. These participants could address the knowledge management strategies deployed in their functional areas to ensure business continuity. Excluded from the participant pool were managers who currently or previously reported to me. The research only focused on knowledge management strategies used during the voluntary resignation of employment of members of the baby boomer generation. The transferability of this single case study is possible because the retirement of baby boomers and knowledge management are topics that will impact other institutions.

Limitations

A limitation of this study was the primary source of data collection through participant interviews. I asked each participant for documentation to verify the information they shared, but it was not a requirement. Additionally, I used member checking to assist in verifying the accuracy of the interview transcription. Moreover, the participants brought their own biases to the study as they shared their experiences during the interview.

As I have decades of experience as a manager and work at the study site, I recognize there was a potential for researcher bias. To alleviate the bias, I excluded managers with whom I was most familiar and any managers who have worked directly for me. Additionally, using the interview protocol consistently with each participant limited bias during the data collection process.

Significance of the Study

Members of the baby boomer generation are in transition and are exiting the workforce or transitioning to other careers, and the next generations are in line for their positions (Duxbury & Halinski, 2014). The loss of the baby boomer employees' knowledge will affect the ecosystem of the organization (Barton, 2019). Higher education managers have traditionally been in their roles for years and have vast knowledge, based on experience, that has guided their actions as managers (Fitch & Van Brunt, 2016; Golden, 2014). Tacit knowledge is knowledge gained as an individual learns through experience. Although tacit knowledge is not easily transferable, it is important to sustain organizations (Nonaka, 1994). The landscape of higher education has become increasingly competitive, and just like in business organizations, knowledge retention and management can provide a competitive edge (Martensson, 2000).

As the generation shifts in the workforce, higher education institutions are losing tenured managers, thus leaving less experienced managers and workforce. As of 2018, the Bureau of Labor Statistics (2018) reported millennials make up 57% of the higher education workforce and according to the Pew Research Center's Fact Tank (Fry, 2018b) are the largest generation. Organizations should develop strategies to manage the knowledge of the retiring population to develop their Gen X and millennial employees who will take over as organizational managers (Petrova et al., 2015). Grant Thornton LLP (2017) reported on the state of higher education and shared institutions will need to invest in ongoing training and development to retain younger members of the workforce.

Knowledge management strategies can sustain organizations and provide development opportunities for employees through knowledge transfer (O'Reilly et al., 2018).

Significance to Practice

Strategies captured as a part of this study could help the organization implement systematic strategies and resources to manage knowledge across the institution consistently. The implementation of a consistent process should sustain the organization from knowledge loss as employees leave the organization. Additionally, there were also findings from the study that could promote future research in the area of knowledge management in higher education institutions regardless of the type of institution. Because people are going to join and leave organizations, there is little that will prohibit personnel changes, but managing knowledge in the organization is critical to sustaining the organization.

Significance to Theory

This study documented the effects of transition on the organization and people within it during the expected retirements of members of the baby boomer generation in higher education. Using Bridges's (2009) model on transition to set the study allowed for expansion of the model to provide a roadmap for organizations to manage future transitions. This study adds to the research about knowledge management practices and expands the area of study as there is little research on this topic in higher education.

Significance to Social Change

The results of this research study could lead to positive social change by aiding an online university's preparation for future workforce changes by developing strategies to

retain tacit knowledge. In the next 5 years, several higher education organizations will stop operations for a variety of reasons (Fain, 2019). Ensuring universities invest resources in retaining institutional knowledge to support their continued operation is important to the higher education landscape. Regardless of the industry, retaining knowledge in the organization supports business continuity to sustain the organization. Information garnered from this study could lead to better outcomes for the institution, constituents, and communities it serves. Implementing knowledge retention strategies across the institution will support the experiences of the institutions' constituents and organizational strategic priorities.

Summary and Transition

The purpose of this qualitative case study was to explore how organizational managers in online universities are transferring tacit knowledge from the retiring baby boomers to their millennial replacements to maintain business continuity. Chapter 1 also included a summary of the background and the problem that set the stage for this qualitative case study. The generational shift of baby boomers exiting the workforce is well documented across most industries. Higher education is now at the beginning of the baby boomer exodus and will be experiencing this change for the next decade. This study may help the institution prepare for the change by capturing knowledge from baby boomers and then storing and transferring it to their millennial employees. Chapter 2 includes the foundation of the study through the conceptual framework and a review of the literature about knowledge management and the generational shift within the management structure of higher education institutions.

Chapter 2: Literature Review

Managers who are members of the baby boomer generation are aging, and many are exiting the workforce, thereby taking with them the tacit knowledge they have developed working within the organization. Although the younger generation is eager and ready for new opportunities, they lack the institutional knowledge members of the boomers are taking with them to retirement (Petrova et al., 2015). The purpose of this qualitative case study was to explore how organizational managers in online universities are transferring tacit knowledge from the retiring baby boomers to their millennial replacements to maintain business continuity.

Knowledge management in higher education organizations is growing in importance as universities face challenges in maintaining their workforce. Knowledge management, specifically knowledge transfer and retention, should be key priorities to any organization experiencing a high level of turnover (Hillman & Wernert, 2017). The focus of this chapter is to provide an analysis, an interpretation, and a synthesis of the literature on knowledge management through the workforce changes. In this chapter, I include the literature search strategy, conceptual framework, literature review, and summary.

Literature Search Strategy

The purpose of this literature review was to analyze current research on knowledge management during the generational shift of the workforce in higher education. Literature reviewed for this dissertation spanned from 1994 to 2020. Sources included textbooks, books, peer-reviewed journal articles, publicly published reports,

government reports, and reports from nongovernmental organizations. Research databases used included EBSCO, ABI/INFORM, ProQuest Central, Wiley Online, Academic Search Complete, Education Source, Emerald Management, Library Science Database, Science Direct, Business Source Complete/Premier, Google Scholar, and the Thoreau multi-database search.

Members of the baby boomer generation have been retiring en masse for almost a decade (DeZure et al., 2014; Riggs, 2017; Wicks, 2017). Their retirement leaves a gap in knowledge retained within organizations as Gen Xers and millennials take over these roles. While there are many documented studies about this topic for several industries, there is little documented research around this topic as it relates specifically to higher education. To account for this gap, I used articles and studies that addressed the concepts across other industries.

The initial search to develop a baseline for the study was through Google Scholar and in Thoreau. Keywords used in the search for relevant literature were *professional development, higher education, millennials, talent management, career development, knowledge management, multigenerational workforce, talent attraction, talent retention, succession planning, succession planning in higher education, business continuity, baby boomer retirement, knowledge creation, knowledge retention, and knowledge transfer*. As a part of the iterative research process, I developed variations of these search terms. Throughout the iterative research process, I used Google Scholar and Walden's Thoreau multidatabase to identify articles and research. The search criteria were filtered for

articles since 2014 to align research within the past 5 years and meet the academic research standards.

Gap in the Literature

Led by Wiig (1997), the process and impact of knowledge management have been researched for years. Wiig's work has led to the development of strategies that help organizations create processes to manage knowledge. Lehman's (2017) research on knowledge management and organizational culture focused on research universities and shared knowledge management strategies that can be used across higher education institutions. Hillman and Werner's (2017) study focused on knowledge transfer in university faculty and staff using design thinking; there was no concern with the generational characteristics or regard for who was involved. Most knowledge management research in higher education relates to student learning, as demonstrated by Alimohammadlou and Eslamloo's (2016) and Ramjeawon and Rowley's (2017) research studies. Universities are proficient knowledge managers as they create, share, store, use, and update knowledge regularly in the curriculum management process.

Researchers have studied workplace behaviors of members of various generation cohorts for several years. The healthcare industry has led the way in studying the impact of generational changes and knowledge management. Kosterlitz and Lewis (2017) led a study for the nursing industry about succession planning and changes as baby boomers retire. The generational research linked to higher education often relates to instruction and student learning, not the management of their staff and faculty. Robinson (2017) noted, "There are few studies that concentrate on generational differences in the higher

education workplace” (p. 72). Additionally, while these studies and others focus on leader succession in higher education, Klein and Salk (2013) and Au-Yong-Oliveira et al. (2018) did not focus on knowledge transfers between the generations as baby boomers retire. This study looked at generational knowledge management as the baby boomers prepare for retirement. Finding 1 and Finding 3 from this study outlined the necessity of knowledge management strategies to transfer knowledge and for business continuity, while Finding 2 identified the important role of knowledge management in the career development of employees. However, generational membership did not play a significant role.

Barton (2019) noted this is an emerging problem that needed additional research in more than private universities. Morris and Laipple (2015) found it takes years for managers in higher education to be proficient in their roles, and as baby boomers begin their retirement, there is an opportunity to learn more about this emerging topic. Although knowledge management and generational workforce changes have been researched across various industries, these areas have not been researched together in the higher education industry. Finding 1 of this study identified the organization needs to provide opportunities and an environment for knowledge transfer to occur. Additionally, an environment with robust knowledge management strategies and systems should support the organization’s business continuity and employee development strategies.

Conceptual Framework

Understanding how managers in organizations can assist employees in transition to capture, store, and retain knowledge for organizational continuity means there is a

need to understand the concepts and theories that support these knowledge management strategies. Bridges's (2009) transition model conceptualizes the transition to change people and the organization as knowledge either leaves the organization or is retained. The following is a description of the primary concepts that provided the foundation for this study.

Bridges's Model on Transition

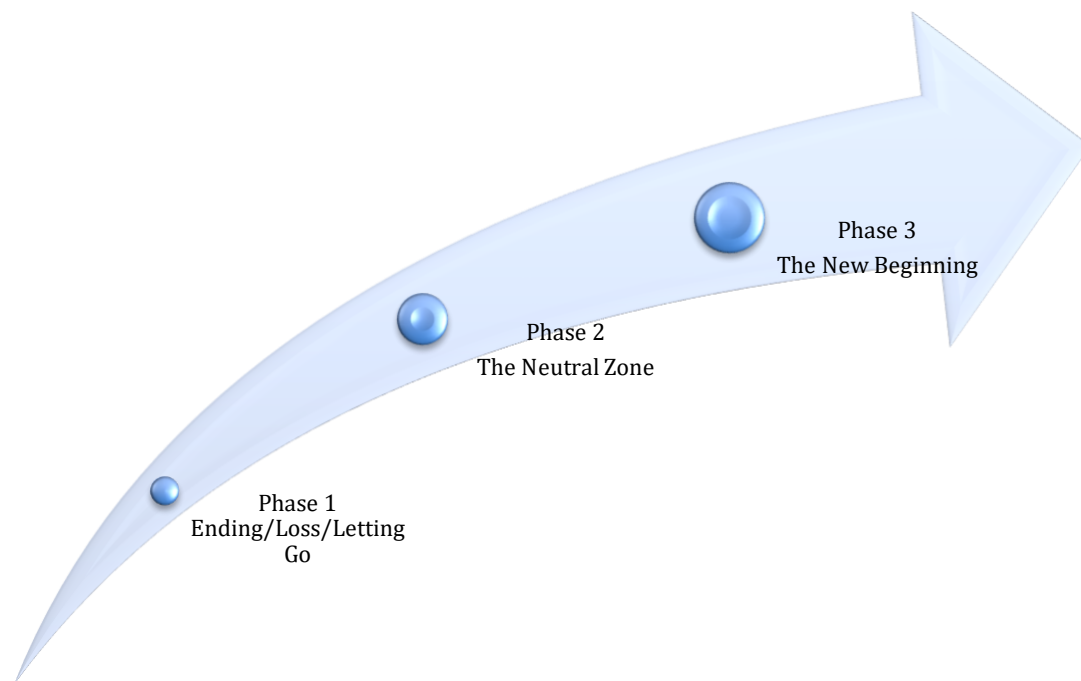
Bridges's (2009) model on transition explains how people and organizations work through changes. Change management is a well-known process, and people constantly think about and plan for it as they map out changes. According to Bridges (2009), "Transition is psychological—it is a three-phase process that people go through as they internalize and come to terms with the details of the new situation that the change brings about" (p. 3). People work through transitions at different rates; therefore, their acceptance or resistance to change will depend on how they have worked through the transition period. While people plan for changes, they do not usually plan for transition, which is an oversight that affects the planned outcomes (Bridges, 2009). Excluding transition from the change management strategy will cause issues downstream as the organization tries to advance through the change management plans.

The life of the organization is people, and when change occurs, they must work through the transition and understand how the transition impacts them. Transitions impact organizations because as members work through transitions, their performance may be affected. Bridges's (2009) model identifies three stages of transition: (a) ending, (b) neutral zone, and (c) the new beginning. Bridges explained, "Transition is a process

which people unplug from an old world and plug into a new world. We can say that transition starts with an ending and finishes with a beginning” (p. 5). Each stage defines the process people go through to develop an understanding of the change.

Figure 1

Bridges' s Model on Transition



Ending

The ending stage is the initial phase when the person learns of the change. A change could be retirement, reorganization, loss of a spouse, marriage, or anything that ends. Whether the change is personal or professional, it affects the person and requires

them to internalize the change and its impact on their life. During this stage, people will feel a loss as they learn of the change. This loss may cause them to grieve before they can let it go. Letting go is the final part of this phase in which people find closure or a way to move from the old normal into the new normal. Bridges (2009) acknowledges that many organizations fail to provide help with this phase, so their planned changes fail because members have not let go of the old world.

Neutral Zone

The second phase of the model is the neutral zone, also known as no man's land (Bridges, 2009). During this phase, people's fears may be more prevalent, and confusion may abound as the individual attempts to make sense of the change. According to Bridges (2009), the neutral zone is the most important phase during the transition period. People in the neutral zone may self-destruct and decide not to move forward and to remain connected to their old world, or they may take the opportunity to learn more about the change and what it means for the future. Bridges went on to say there are opportunities for organizations to help people through the neutral zone and onto the new world by being patient and providing information and opportunities for discussions. This phase is the point that can determine whether people are going to move forward or stay in the same place. An organization's success will depend on whether people have moved forward during the transition process.

New Beginning

The final phase of the model is the new beginning. In this phase, the change is effective, and the person and organization have moved into their new reality. During a

managed transition, new energy full of excitement will exude and reinforce the new identity (Bridges, 2009). During this phase, it is important for the change leaders to remind members of the purpose and identify the outcome, their role, and the plan to reach the outcome. Providing this information continues to reinforce the importance of the change and helps people work through the transition process. It is important to identify those who are not going to be a part of the future organization and help them transition out. Assisting people in understanding and visualizing the future is key to acceptance, support, and excitement.

Identified Concepts

Throughout the literature, there are several identified concepts important to organizational knowledge retention as the workforce changes. The baby boomer generation has created much of the institutional knowledge as they created many of the positions, processes, and policies in practice in the organization. Knowledge management strategies can support talent management and professional development strategies while aiding in the retention of employees. As baby boomers exit, it is increasingly important to ensure institutions are retaining their millennial employees, who are now the largest generation in the workforce.

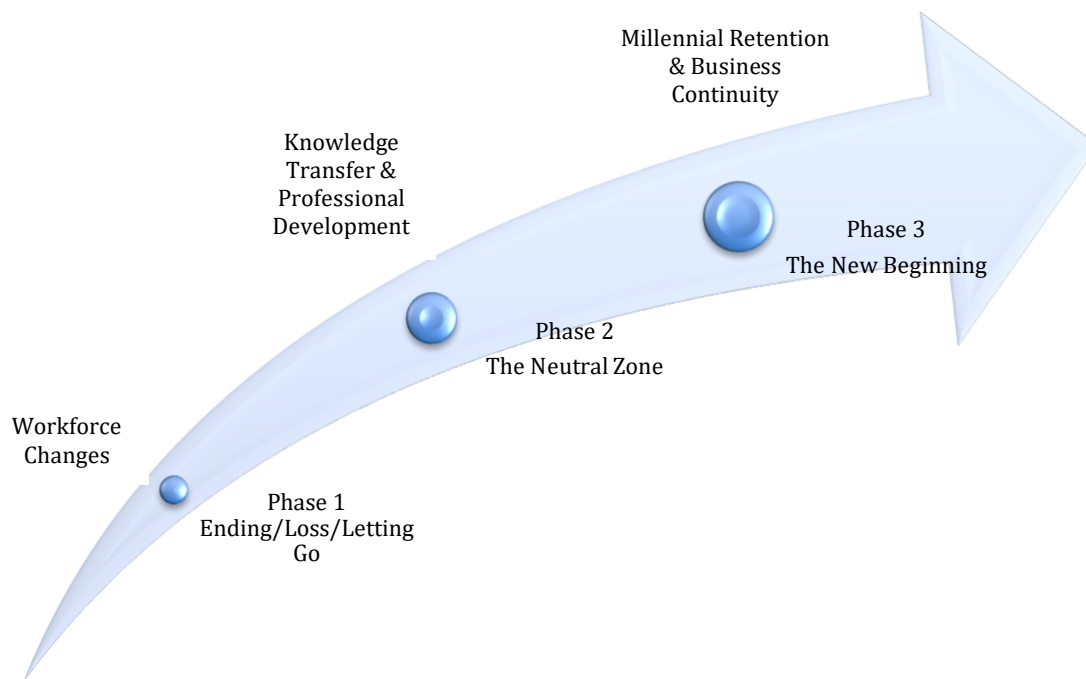
Practical Applications of Concepts

Connecting with people experiencing transition and supporting them is a significant element and strategy that is often missed by organizations. Retiring baby boomers are leaving gaps in knowledge and experience as they exit the workforce in higher education. There is an opportunity for organizations to assist people with the

transition through this process. As identified in Figure 1, Bridges's (2009) model has three phases of transition: ending, neutral zone, and a new beginning, all of which are phases employees affected by the retirement of baby boomers are experiencing. A strategic plan can be created to retain, transfer, and manage knowledge in organizations and help people manage the transitions. Organizations can also use this as a part of the professional development plans for those that will assume new positions and responsibilities, and they can use it as a retention strategy.

Figure 2

Knowledge Management Amid Workforce Changes Using Bridges's Model



During the various phases of transition, activities can be planned to build the confidence of the remaining employees and support the organization's plan for business continuity. While in the ending phase, people are coming to terms with the change and

are working to understand why it is occurring. During the ending phase—the realization that baby boomers are retiring—organizations should review the remaining personnel to determine knowledge gaps. The neutral zone is a time where those preparing to leave can help develop the remaining employees by transferring explicit and tacit knowledge to those who will remain. Then, finally, once the retiring employee has left, those who remain have either been promoted or given opportunities and have a chance to start something new. Throughout the phases, the institution plays a role as a facilitator to ensure the organization can continue without interruption while supporting employees through the transition associated with workforce changes.

Literature Review

The multigenerational work environment in higher education is experiencing a change in demographics as members of the baby boomer generation move into retirement. The millennial generation has consistently shown low organizational commitment (Au-Yong-Oliveira et al., 2018; Clark, 2017; Trees, 2015). This behavior, and the retirement of the baby boomers, will leave organizations struggling to maintain normal business operations. Most industries have been experiencing this change for a while; higher education institutions are now experiencing changes in the workforce as more of their workforce retires. The retirement of the baby boomers and the challenges of retaining millennial employees presents a real problem for the management of higher education institutions to maintain business continuity and retain institutional knowledge.

Generational Cohorts

Generational cohorts are groups of people born within the same date range and share similar cultural experiences (Ozkan & Solmaz, 2015). The generations currently in the workforce are the Traditionalists, baby boomers, Generation X, millennials, and Generation Z. The multigenerational workforce has both varying needs and varying levels of engagement. Many of the differences identified between the generations are due to people being at different stages of life (Riggs, 2017). Although it is true members of each generation are at different points in the life cycle based on age, studies have shown each cohort has specific traits (Jones et al., 2018). Martin and Waxman (2017) shared there are far more similarities than differences between the generational cohorts.

There have been a variety of generational studies with varying focuses, but none resulting from a specific theoretical framework (Jones et al., 2018). However, even though the studies have not resulted in standardizing cohort behavior and expectations in the workforce, they have provided the needed research to understand each cohort. Those who are entering the workforce have energy and enthusiasm to share and use their skills as a demonstration of their knowledge (Zentner, 2018). Baby boomers are retiring in larger numbers, which thus creates vacancies for members of the younger generations, and this is called the great generational shift (Tulgan, 2016). As the shift occurs, it is important organizations attract and retain the best and brightest of the younger generations (Wicks, 2017). Heisler and Bandow (2018) stated “there will be a significant skilled worker shortage over the next 20 years” (p. 421). The current workforce is in transition as baby boomers retire and Gen Xers move into management roles; millennials

are navigating current workplace roles and creating their own (Barton, 2019). In a multigenerational environment, it is important to understand the characteristics of each generation to support their developmental needs.

Traditionalists

There are five generations in the workforce. The oldest generation is the Traditionalists, also known as “matures,” “the silent generation,” and “loyalists.” Members of this generation were born between 1926 and 1944 (Fry, 2018a). Members of this generation experienced the Great Depression and World War II; these events shaped their perspectives and their expectations related to work and education (Clark, 2017; Williams, 2015). Because they lived through such tumultuous events, they sought stability and security and saw work as a privilege because they knew that not everyone has the opportunity to do so (Clark, 2017). This generation worked hard and expected the same of others.

When seeking employment, this generation focused on attaining positions to achieve a good financial foundation (Howe, 2010). The desire to obtain positions that allow for financial stability aligns with lessons learned through the catastrophes they experienced. Members of the Traditionalist generation were a part of the industrial revolution; the jobs required technical and vocational skills (Clark, 2017; Williams, 2015). This generation had a lower percentage of members who received higher education degrees as compared to other generations (Dwyer & Azevedo, 2015). The population of those from this generation who are still working is small, but there remains a subset of people in the workforce.

Baby Boomers

Baby boomers, also known as “boomers,” were born between 1945 and 1964 (Fry, 2018a). Until recently, the boomers comprised the largest generation in the workforce (Fry, 2018b). Members of this generation had several life-altering events that caused significant changes in American culture, such as the Civil Rights Movement, the Vietnam War, the Korean War, and the assassinations of Martin Luther King, Malcolm X, President John F. Kennedy, and his brother Attorney General Robert F. Kennedy. The boomers grew up with two-parent households in which the maternal figure remained at home (Jones et al., 2018). This generation grew up and started questioning the traditional values and laws of society and pushed to make changes for more equality and the celebration of peace and love.

As the baby boomers transitioned to the workforce, they were very competitive and created the “corporate ladder.” Hence, they are often described as having “workaholic” behavior (Riggs, 2017). At the peak of its generation, the Boomers comprised approximately 74.9 million compared to the Gen Xers (approximately 65.8 million), which further reinforced it has been the largest generation in the workforce (Fry, 2018a). Members of this generation were the first to go to college en masse and have the largest proportion of generational members with higher education degrees. The official retirement age, according to the United States Social Security Administration (2019), is 66 years and two months. The oldest of the Boomer generation has reached retirement age, but there are still many in this generational cohort who have several years before they reach the age of retirement.

Generation X

Members of Generation X cohort were born between 1965 and 1980; it is historically the smallest of the current generations (Fry, 2018a). Gen Xers were born during a time when Americans were having fewer to no children (Fry, 2018a). Events that impacted the development of this generation were Watergate, the Challenger disaster, the fall of communism in the Soviet Union and East Germany, and the end of apartheid in South Africa. Most of the parents of this generation worked outside of the home, and they also had higher divorce rates, which led to this cohort's "latch-key generation" identification (Clark, 2017). In contrast to previous generations, many members of this group spent hours after school home alone.

In the workplace, Gen Xers have placed their professional endeavors and goals behind the needs of their families (Riggs, 2017). Members of this generation do well in autonomous work environments that provide feedback, as opposed to orders, to keep them engaged and motivated. This generation believes hard work, education, and experience pays off and leads to success (Howe, 2010). Gen Xers are the first generational cohort to experience multiple career changes; they will have about seven career changes throughout their career path (Martin & Waxman, 2017). In the workplace, members of this cohort prefer direct communication, which is more efficient and allows them to focus on results (Jones et al., 2018). Members of this generation are hard workers but insist on a work-life balance as they have many years before reaching retirement age.

Millennials

Members of Generation Y were born between 1981 and 1995 and are known as millennials, Nexters, and Generation Why (Fry, 2018a). As one of the youngest generations currently in the workforce, the pivotal events that will impact this generation are still occurring; however, the 9/11 tragedy, the Iraq wars, and numerous school shootings will characterize much of this generation's life. The Gen X parents of the millennials have worked hard to ensure their children did not feel the neglect they felt as latch-key kids (DeZure et al., 2014). Characteristics of this generation are being optimistic, embracing diversity, and codependent multitasking (Dwyer & Azevedo, 2016). Researchers do not agree on the autonomy of this generational cohort; some identify this population as independent, others as dependent, and the rest describe them as codependent. The better-known characteristics of this generation are they are demanding, impatient, and overconfident (Kuhl, 2014). These characteristics could also be related to the technological advancements and the rapid rate of change this generation has grown up with and become accustomed to in their lifetime.

This generation's ideal working environment is much more casual than previous generations (Wicks, 2017). Millennials believe their abilities and skills have better prepared them for positions and leadership opportunities than others. This generation had more access to technology, and they can adapt at a faster rate to technological changes than members of other generations (Clark, 2017). Technological advancements have provided more access to information, which has led to an expectation that information will be accessible and readily communicated. Millennials expect transparency from authority and distrust centralized authority (Jones et al., 2018). Relationships between

bosses and employees are seen both as professional and personal relationships; therefore, the friend/boss line is much blurrier for this population than for any other generation (Wicks, 2017). For millennials, the bridge between work and life is how they see authenticity and transparency.

Generation Z

As the youngest cohort, members of this generation were born between 1996 and 2012 (Shatto & Erwin, 2016). World events that impacted this generation are generally the same as the millennials: the 9/11 tragedy, the 2008 recession, and the introduction of social media. In the United States, Generation Z is the most diverse generation, with biracial/multiracial children comprising the largest population within the generation (Shatto & Erwin, 2016). This group is the largest generational cohort in the United States to be homeschooled (Clark, 2017), most likely because members of this generation have had access to technology from a very early age and are extremely comfortable using it. Members of Generation Z prefer to use apps that allow them to share but not leave a digital print, such as Snapchat; however, they are very comfortable sharing private and personal information with others (Kick et al., 2015). However, how they share information and the media is often seen as immature and inappropriate.

As this generation is the newest to enter the workforce, there is not a great deal of information about their work behaviors and expectations. Based on Gen Z's education experience, they behave as independent workers who do not appreciate authority figures and want their ideas heard (Ozkan & Solmaz, 2015). Organizations will need to include technology in their continuous process improvement to change business practices for

their industry (Clark, 2017; Kick et al., 2015). As seen with the millennials, interpersonal skill development will be important to ensure members of the workforce are building relationships to aid in the development of their workforce (Shatto & Erwin, 2016). Each generation has different characteristics, needs, and preferences based on their lived experiences and stages of life. Organizations need to ensure they are prepared to meet the needs of their workforce.

Knowledge Management

Knowledge management is the process organizations use to create, capture, use, and reuse information (Lehman, 2017). Knowledge management is also called knowledge creation, knowledge retention, and knowledge transfer. Martensson (2000) defined knowledge management as the process of managing intellectual capital. It takes an enormous amount of knowledge to create, manage, and support any organization. A university is designed to create, maintain, and transfer knowledge to its students and the university community (Petrova et al., 2015). Higher education institutions are knowledge communities, and the expectation would be that they are professionals at knowledge management. However, most institutions of higher learning do not have an organized knowledge management program to capture organizational knowledge (Petrova et al., 2015). Defining knowledge is complicated and is a result of an individual piecing data and information together to make meaning (Davenport & Prusak, 1998). Knowledge is defined as the result of when an individual translates data and information in a way that is meaningful for them to use, store, and create new knowledge (Lehman, 2017; Martensson, 2000). In a learning community, knowledge is continually being created and

shared. Therefore, higher education institutions need to ensure they have similar strategies in their business structures they use to teach their students.

Types of Knowledge

There are two forms of knowledge: explicit and tacit knowledge. Explicit knowledge is the knowledge that can be explained, documented, and transferred to others (Davenport & Prusak, 1998). Tacit knowledge is not easily captured or transferrable from one person to another person (Davenport & Prusak, 1998). People often think of knowledge as data or information when, in fact, knowledge is how an individual makes meaning of these individual components (Lehman, 2017). Organizations are full of data and information, and many have even created comprehensive ways to capture explicit knowledge through standard operating procedures and policies. However, the area that differentiates organizations and people in the organization is the tacit knowledge component (Martensson, 2000). Tacit knowledge is learned through experience and by going beyond what is explicitly written down.

Knowledge Creation. Organizations have an impressive amount of data and information, but it takes the knowledge of an organization to operate. According to Davenport and Prusak (1998), knowledge is created over time by individuals taking granular knowledge (data and information) to create an understanding that is important to them. Knowledge may be in the form of tacit or explicit knowledge, but regardless of the type of knowledge, organizations need it to do business. According to Davenport and Prusak (1998), there are five modes of knowledge creation: generation, acquisition, fusion, adaptation, and networks. An example of an organized knowledge management

activity is members of an organization working together specifically to acquire, discuss, formulate, and document knowledge. Purposeful activities like this frequently happen in the formation of organizations but are often practiced less in mature organizations.

Knowledge Retention. A key component of knowledge management is knowledge retention. Davenport and Prusak (1998) identified this step as codification or codifying organizational knowledge in an accessible form so everyone across an organization can retrieve and use it. Retaining knowledge in an organization can be one of the greatest challenges (O'Reilly et al., 2019). Another issue is identifying what is relevant to retain and not trying to capture everything (Davenport & Prusak, 1998). Organizations use standard operating procedures to capture explicit knowledge around business processes and policies. Capturing explicit knowledge is far easier for organizations to capture than tacit knowledge. However, as Lehman (2017) acknowledged, managing explicit and tacit knowledge is essential for sustaining the organization. A retention strategy some organizations use is to create historical documents that capture policies, decisions, and the context in which they were formulated to help leaders understand the past (Guth, 2018).

Knowledge Transfer. Sharing knowledge between employees is an additional hurdle for organizations. Organizations must find a way to share information amongst employees as it is the only way to pass tacit knowledge between members in the organization (Martensson, 2000). The inability to share knowledge is a growing issue because of generational communication challenges, people changing jobs, a higher rate of retirements, and office structures. Explicit knowledge is usually captured in standard

operating procedures and can be shared routinely with employees. Tacit knowledge is more challenging to capture and to share with others. Tacit knowledge is often shared via conversations and through relationships, and with the changes in office structures, more remote staff, global offices, and less face-to-face interaction, sharing is not easily accomplished (Petrova et al., 2015). Organizations are investing in ways to share knowledge. Davenport and Prusak (1998) shared “some structure for knowledge is necessary, but too much kills it” (p. 68); however, organizations must find a way to facilitate relationships to transfer knowledge between employees to support continuity through the change.

Knowledge Management in Universities. Knowledge management in most universities is lacking (Petrova et al., 2015). Even though knowledge creation and transfer is the purpose of universities as they educate their students, most do not have knowledge management strategies for retention and transfer in the organization (O’Reilly et al., 2019). Knowledge is a key asset for any organization, and that is never truer than with a higher education institution (Hillman & Wernert, 2017; Lehman, 2017). A common complaint in higher education is their organizational structures create silos and information gets lost (Lehman, 2017). The limited ability to share information can affect an organization’s decision-making; knowledge management can support better decision-making, cost reduction, and improved efficiencies. Universities are building communities of knowledge and knowledge management is inherently built into its fabric and can be a differentiator during organizational transition periods (Martensson, 2000).

As baby boomers continue to retire, capturing their knowledge is important to the business continuity of the institution, but it also allows institutions to understand their capabilities (Hillman & Wernert, 2017). The exchange of knowledge between people takes engagement (Martensson, 2000; Petrova et al., 2015). Tacit knowledge is not knowledge written down and exchanged passively; rather, people must interact to exchange this type of knowledge. Knowledge sharing is a social transaction, so organizations must create ways for organizational members to interact to exchange ideas (Hillman & Wernert, 2017; Petrova et al., 2015). Guth (2018) shared the retiring generation has a massive amount of knowledge that organizations are not going to be able to replace. Institutions must create ways to capture and transfer knowledge in their workforce.

Knowledge management is a part of all organizations and a part of every person's daily life. On a personal level, each person manages the information they take in and uses their cognitive abilities to store, analyze, and transfer the information into knowledge they can use (Hillman & Wernert, 2017; Lehman, 2017; Petrova et al., 2015). Any organization creating knowledge management strategies must create goals and connect them to the process (Martensson, 2000). Knowledge is important to every organization, and without people, knowledge is not created, retained, or transferred.

Higher Education Organizations

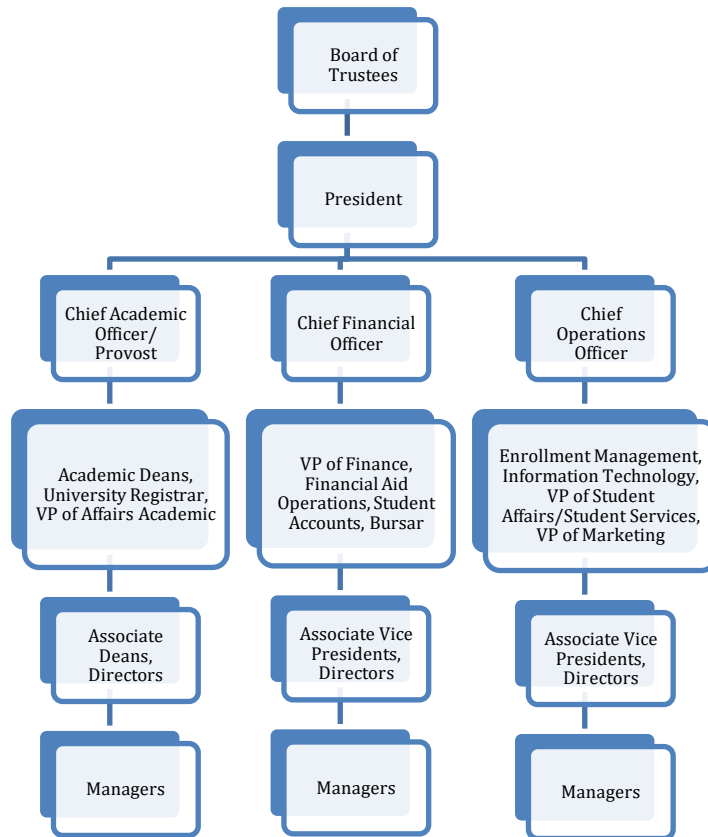
The hierarchal structure of the management of most higher education institutions consists of many layers of management and departments. The organizational structure of most universities is similar. The following universities were used as reference points to

create the sample organizational structure: American Public University System (APUS), George Washington University (GWU), George Mason University (GMU), and University of Virginia (UVA).

As outlined in Figure 3, public and private institutions have very similar structures; there may be different titles at various levels, but the overall structure of university management is similar. Included is an explanation of the top four leadership levels found in most academic institutions. The top tier of the organizational structure starts with the Board. In public institutions, the board reports to the Governor or the state legislative body, whereas in private institutions, the board reports to stakeholders, foundations, or investors (Wicks, 2017). The purpose of the board is to help the institution stay on track to meet its organizational goals and to remain future-focused and accountable for being fiscally responsible.

Figure 3

Example Organizational Structure of Higher Education Institutions



The next tier of leadership in higher education institutions is the president. The president of the institution is responsible for the overall operation of the university. The university management structure is consistent with business structures (Klein & Salk, 2013). The president, who is at the same level as the Chief Executive Officer (CEO), has the responsibility for leading and determining the vision, mission, goals, and the strategic priorities of the university. The hierarchal structure of higher education institutions has

three primary components: academics, operations, and finance. The third tier of university management consists of executive leaders that manage these specific areas. The executive leaders support the president to determine the strategic priorities for the organization. The executive leadership works with the next tier that usually consists of academic deans and vice presidents in charge of various departments (i.e., general counsel, university registrar, finance, information technology, human resources, and facilities) and academic schools that implement the strategy (Rudhumbu & Maphosa, 2015). Each of the departments and academic schools has additional tiers of management to manage their daily operations. These four tiers make up the traditional hierarchical structure of most universities. Each university tailors the additional organizational structure of their university based on their institutional needs. Below these four tiers, the titles will vary based on institution, but there is usually consistency in the top four tiers of management at most universities.

Higher Education Management Demographics

The higher education workforce is changing due to the aging and retiring of employees. Many of the senior-level administrators of higher education institutions have been in their roles for several years; the tenure of most university presidents averages seven years (Gagliardi et al., 2017). According to Phillippe's (2016) survey of community college presidents, over 50% of those presidents indicated they would retire within the next seven years. Barton (2019) shared that many of the current managers of higher education organizations are preparing to leave their roles at a higher rate than ever before. There is a connection in the change in management and leadership's age

demographic. In their study, Gagliardi et al. (2017) shared the average age of senior administrators is 62. The shift in the management landscape of higher education institutions has developed slowly, but it has been consistent as the baby boomer generation continues to get closer to retirement age (Fry, 2018a).

The generational changes occurring across industries are and will continue to impact education organizations because 85% of the senior leaders in education institutions are comprised of members of the baby boomer or the traditional generation (Gagliardi et al., 2017). According to the Bureau of Labor Statistics (2018), as of 2018, the average age of staff at postsecondary institutions is 41. That median age reminds us the millennial generation is the largest in the workforce. As boomers age and establish retirement dates, members of the millennial generation are ready and waiting to be next in line.

Changes Affecting Higher Education

Changes affecting higher education include but are not limited to a decline in student enrollment, a decrease in funding for public institutions, and disruptions of traditional approaches to learning (Thompson & Miller, 2018). Student enrollment has the largest impact on higher education and influences an organization's budget, staffing, technology, and processes. Across higher education, student enrollment has declined. A decline in student enrollment means a decline in tuition revenue (Barton, 2019; Thompson & Miller, 2018). A decline in revenue causes organizations to have smaller budgets and reduced expenditures. Reducing budgets will lead to a reduction in staff,

technological expenses, and other expenses, meaning the organization will have leaner operating budget.

Reducing expenses will also cause institutions to perform a needs analysis of their expenses to be fiscally responsible with resources (Barton, 2019; Thompson & Miller, 2018). In many organizations, training positions are eliminated or consolidated, new technology implementations are not purchased, and process changes that may require new technologies or training and process redesign are reevaluated for less expensive solutions or are cut from the budget. The decrease in student enrollments also affects the salaries of members of institutions. Table 1 outlines the median salary according to the Bureau of Labor and Statistics.

Table 1

2018 Bureau of Labor and Statistics Median Salary for Higher Education

Position	Median salary
Higher education administrator	\$94,340
Full-time faculty	\$78,470

Public institutions rely on state and federal legislatures for funding, and many public institutions have not given their staff increases in years, which adds to the challenges of retaining employees. Jacob and Gokbel (2018) shared student enrollments will also continue to decline as many students are leery of adding to their debt and looking for alternative education solutions. In the current economic environment,

financing will continue to be a problem for institutions as funding continues to be restrictive.

Talent Management

Talent management is a business management strategic process businesses use to manage their organization's performance (Muriithi & Makau, 2017). The management of human resources goes beyond hiring and firing; for example, under the talent management process, there is a link between organizational performance and the development of people. Krishnan and Scullion (2016) and Rudhumbu and Maphosa (2015) shared their perspectives talent management is a systematic way for organizations to attract, develop, and retain high performing employees. A part of talent management is assessing employees' abilities and their productivity (Lin, 2017). Thunnissen (2016) recognized strategic talent management has increased in popularity due to the aging workforce. Talent management is systematically used in the business industry. Hence, most organizations build it into their strategic priorities as a way to maintain a competitive edge. The three parts of talent management are further explained as it is important in an organizations' knowledge management strategy.

Recruiting and Hiring

Due to a variety of impacts, organizations are experiencing challenges with attracting and retaining talent (Pant & Venkateswaran, 2019). Talent management strategies can help organizations strategically plan for their organization's growth and changes in their human capital. The initial step in the talent management process is the attraction of talent. Ly (2015) stated for organizations looking to attract younger talent,

they need to write inviting position announcements that do not require multiple years of experience. People are attracted to organizations that have good reputations and share similar values (Saurombe et al., 2017). Talent management is important as changes in the economic environments for all industries occur rapidly.

Researchers have identified the importance of the global economy in the management of talent and the opportunities people have now across industries (Muriithi & Makau, 2017). As the world of higher education changes and there is more competition for students, the competition increases for the right individuals as members of staff and faculty. Over the next decade, there will be significant turnover in senior-level administrators at institutions of higher education (Barton, 2019; Zentner, 2018). Saurombe et al. (2017) noted attracting qualified scholars has been, and continues to be, a challenge for higher education institutions. The attraction of qualified talent is the initial step in the talent management process. Once organizations identify qualified candidates, they will then go through the hiring process, which includes presenting the candidate the offer, job benefits, start date, and other information related to their onboarding. It is imperative institutions align their hiring to their strategic initiatives to ensure they are hiring for the right positions (Rudhumbu & Maphosa, 2015). Connecting positions to strategic initiatives can guarantee institutions properly resource the initiatives.

Employee Retention

Employee retention is another component of talent management. With the increased competition for students, staff, and faculty, institutions should be concerned about maintaining resources and preparing for the future (Rudhumbu & Maphosa, 2015).

Providing highly engaged talent management strategies and recognizing key talent across the organization will help institutions during the coming years, which will bring talent shortages (Pant & Venkateswaran, 2019). As the baby boomers transition out of the workforce, an organization's ability to retain current employees and promote them will be important to sustainability.

Employee Development

Talent management ensured the training program takes the employee's skills and abilities and enhances them to enable them to achieve organizational goals (Lin, 2017). Development of talent is a continuous process (Tetik, 2016); due to technological influences, most organizations have a continuous learning environment and employees are learning daily. There remains a reliance on organizations to provide development opportunities for their employees; however, more and more employees are taking ownership of their employability (Pant & Venkateswaran, 2019). Whatever talent management strategies an organization deploys, it should be dynamic to meet its employee's needs. Members of the various generational cohorts have differing needs, meaning talent management must be dynamic. Talent management raised awareness and recognition across all industries that people are the greatest asset to any organization (Tetik, 2016). Developing talent and providing growth opportunities will be an important strategy to retaining members of the younger generation.

Succession Planning

Succession planning is not a new concept and has been used by many organizations across industries to prepare for the future. Succession planning is a process

in which organizations strategically plan for their long-term success (Barton, 2019). Succession planning is relational; organizations must have an awareness of their talent and their individual goals to align the right people with organizational positions that will align with both the individual and the organization's plans. According to Kosterlitz and Lewis (2017), by 2020, millennials will comprise 50% of the U.S. workforce. There is a question about whether talent should be nurtured or not, which, for organizations, impacts the use of succession planning (Thunnissen, 2016). More than half of the current academic presidents have experience as either an academic dean or as a chief academic officer (Gagliardi et al., 2017; Klein & Salk, 2013). However, this experience is rarely at the same institution in which they were president. Higher education organizations want people to have experience but want that experience to be from other organizations.

Succession planning in higher education, specifically for presidents, has been underutilized. Boards of trustees utilize search firms for the selection of university presidents, which is lengthy and costly, but boards want the best in the nation (Klein & Salk, 2013; Lapovsky, 2006). Using succession planning in higher education to fill presidential roles could eliminate some expenditures but could also help the organization prepare for the future. Current administrators must be engaged in the development process; without their involvement, succession planning will not be successful (Barton, 2019). Presidents, provosts, and other executives work to create the strategic priorities of the institution, and for implementation, they need help from others. Succession planning is an ideal development opportunity for those identified as key talent and future

managers. The current managers must prepare their successors as they know what areas of need exist and the challenges the organization currently experiences.

Knowing that key roles will be in transition due to an aging workforce and career path transitions, using succession planning can help institutions prepare (Garman & Glawe, 2004). Succession planning is a component of talent management (Golden, 2014). Organizations create development plans to retain their employees, identifying people for roles is critical to meet the institution's needs and support employee growth (Muriithi & Makau, 2017). Hence, it is time to change how human capital is valued so organizations maximize the use of their human resources.

As mentioned previously, the management structure of higher education organizations has been consistent for years, with little change to the structure. Succession planning is a strategy used minimally in most higher education organizations. Recruiters in higher education organizations employ a traditional pattern to search for their senior leaders. At most institutions, this traditional pattern does not include promotion from within. Lapovsky (2006) shared higher education organizations employ search committees for new senior leadership because there are beliefs that internal candidates will have difficulty separating their relationships and perceptions of others that will now be working for them. Barton (2019) also shared most universities have a traditional view of promotions and the development of faculty and staff, which leads them to midlevel administrator roles; however, they also believe they need to work in other environments to expand their experience and knowledge. As Gagliardi et al. (2017) stated, "with a substantial amount of turnover expected in the college presidency and senior executive

roles, institutions and systems will need to have succession plans in place in order for a smooth leadership transition” (p. 58). Institutions have spent resources to develop leaders across their campuses but continue to observe traditions that keep them from exploring and promoting talent into senior positions.

As with other organizations, succession planning has to be a strategic priority for the institution. Succession planning is not just the job or interest of the president or the head of human resources; it must be the priority of all and embedded in the strategic priorities of the institution and at every level (Barton, 2019). The idea a president or provost will continue in their role in perpetuity is an idea not based in reality.

Organizations have talent in that they are training to do their jobs but also helping them prepare for their future by exposing them to the daily activities of the university (Golden, 2014). Zentner (2018) developed a conceptual framework called the 4A’s—attract, acquire, acquaint, advance—as a way for institutions to prepare for their future in a strategic way to help them prepare for the changes in the workforce and technology changes that will also affect higher education. Change is inevitable, but higher education institutions must change their strategies for talent management to prepare for their futures.

Higher education is battling a multitude of perceptions and questions about its usefulness as an industry; the continued increases in tuition costs and slow rate of innovation detracts from its purpose in society. To remain relevant, institutions will need to connect millennials to the vision, mission, and culture to retain the best and brightest talent (Wicks, 2017). Retaining millennials in the organization is critical to

modernization and maintaining business processes. Millennial organization commitment increases when organizations include them in the organization's strategic priorities (Glazer et al., 2019). Millennial involvement in the strategic planning process captures their ideas and is a professional development activity that prepares them for future involvement.

Professional Development Strategies

Professional development strategies can help both organizations and the employees they aim to develop. To retain talent, professional development strategies should be an organization's priority and include coaching, mentoring, or leadership training (Thunnissen, 2016). Fried (2015) found companies provide professional development programs for the following reasons: staying competitive, having a more flexible organizational culture, improving talent management, leveraging their current workforce, and minimizing internal threats due to workforce demographic changes. Members of the various generations may not view professional development opportunities in the same vein and may have differing delivery preferences. In their study, Glazer et al. (2019) found some millennials do not see professional development as a priority. However, other studies have found a lack of opportunities is a major factor in millennials leaving organizations. It is up to the organization to determine the best strategies for their constituents, but it is also increasingly important to provide options to employees.

Organizations that offer career planning and development for their employees show their needs are important (Tsui et al., 2017). For organizations, career planning also

provides an avenue to succession planning and the preservation of continuity amongst the organization's leadership (Webb et al., 2017). Fried (2015) shared professional development programs are critical to retaining an engaged and productive workforce. Career coaching and developing a career map can help the organization understand their talent and their plans for the future (Yates et al., 2017); it can also demonstrate the organization's commitment to the development of its staff.

Career Paths

Creating a career path for employees is an important part of professional development strategies; employees find great dissatisfaction when future career opportunities are not identified (Thunnissen, 2016). Kassab (2016) shared organizations that help high performers develop management skills will support their transition into management roles more successfully and will be more supportive of peers as they move up the corporate ladder. As employee demographics and globalization have changed many industries, organizations have determined career development programs can help them remain successful (Fried, 2015). Biron and Eshed's (2017) study found employees who participated in organizational-sponsored career paths were more engaged and showed greater commitment to the organization. Organizational commitment can improve, and future managers identified with creating career ladders and paths for employees to navigate through to plan their future.

Organizations can help their employees develop their career paths by providing learning and development programs. These programs can help people develop specific competencies and skills that can assist their development in areas that will allow them to

move forward in their careers. Learning and development programs often cover multiple topics that will aid in the personal and professional growth of individuals (Bartz et al., 2017). According to Fixsen et al. (2018), self-governance skills can help people reflect on their professional goals and the path to achievement. Opportunities that support personal growth show support of the individual, which can also increase their organizational commitment (Fried, 2015; Fixsen et al., 2018). Planned career paths show employees institutions value them and encourage them to develop within the organization and help the organization meet its goals.

Mentor Relationships

Mentoring is a developmental strategy businesses and learning organizations have used for years to help new and younger employees acclimate to the organization. A traditional mentor relationship uses a more established employee as the mentor and a junior-level employee as the mentee (Morris, 2017). The mentor and mentee then develop a relationship in which the mentor imparts knowledge to the mentee. Learning from tenured employees is gaining in importance as Boomers continue to retire (Guth, 2018). This type of developmental strategy builds relationships between members of the organization and is a way to capture tacit knowledge between people and retain knowledge in the organization.

The relationship between an employee and a supervisor can move from a supervisory relationship to one of a formal or informal mentor relationship. Hancock and Hums (2016) found supervisors are seen as confidants that employees feel comfortable speaking to because the employee sees them as someone who understands their

challenges. Mentors provide support on a variety of levels that include knowledge sharing, confidence building, professional guidance, and a networking link (Hancock & Hums, 2016; Tsui et al., 2017). The honesty and trust that is critical to successful mentor relationships can provide both parties an avenue to create a life-altering relationship.

In some industries, such as higher education, mentors are critical to the career development and progression of career professionals (Hancock & Hums, 2016). In higher education, leaders have been in their roles for several years, which allows mentorships to acclimate new hires and share knowledge across the organization. If the organization is using mentor relationships to share knowledge, peer mentors can be important to encourage and support the organization's knowledge management strategies.

A new form of mentoring—reverse mentoring—is in use in some workplaces. Reverse mentoring takes the traditional mentor relationship and changes the concept where the junior-level employee is the mentor and the senior-level employee is the mentee (Morris, 2017). In reverse mentoring, the two are building a relationship, but this gives power and authority to the junior-level employee to help develop their leadership skills and preparedness for their future positions. Morris (2017) noted another concept of this relationship is that it will allow the junior-level employee to share new technological advancements and practices with senior-level, less tech-savvy employees. By reversing the roles, organizations essentially reverse their culture, as this type of relationship not only changes the dynamics in the relationship but also those in the organization (Harrison, 2017). This type of environment will be very attractive to millennial

employees as it demonstrates the organization is open to change and responsive to the needs of their employees.

Career Coaching

A strategy that has increased in popularity over recent years is the coaching strategy. According to Bartz et al. (2017), developmental coaching focuses on helping the employee learn skills and competencies they have not yet mastered. This form of coaching, if done effectively, can transfer skills between generations and employees to aid in the development of the employee being coached. Career coaching is important in understanding the developmental needs of the employees in their organization (Lim et al., 2019; Yates et al., 2017). A benefit of coaching is the tailored developmental techniques specific to each individual. If an organization sponsors the coaching for its members, there is normally a connection to the organization's strategic priorities (Lim et al., 2019). Organization sponsored coaching is mutually beneficial for the employee and the organization.

Coaching is an avenue to help people develop specific skills. Coaching is also an interpersonal relationship between a coach and the coachee that allows for engagement between the two parties in which direct feedback is given (Lim et al., 2019). Guth (2018) stated millennials prefer to have a high-level of feedback in the workplace and acknowledgment of the work they are doing. Tsui et al. (2017) found coaches use solution-focused techniques to guide those they are coaching to achieve their goals, and that feedback is a critical technique used. Over recent years, coaching has become one of the most effective learning and development strategies (Lim et al., 2019). Institutions are

spending valuable resources to provide coaches to members across the management team to support their development and performance. The investment shows support in developing their workforce both now and for the future.

Business Continuity

Emergencies occur daily across the globe that impact processes and functions; these emergencies include natural disasters, breakdowns in information technology and telecommunication systems, and utility system failures. The aforementioned emergencies are external disruptions to organizations; however, there are also internal emergencies that can cause disruption. Business continuity is an organization's plan that provides critical processes, functions, and personnel the organization needs to run their business (Fisher et al., 2017). Organizations can and should prepare for emergencies that impact their normal processes by developing a business continuity plan.

The daily emergencies at higher education institutions are similar to those of other businesses: secure proprietary information, customer personally identifiable information, financial information for the customer and the organization, information technology security, and so on. Tracey et al. (2017) shared, "business continuity planning is a strategy used to promote organization resilience by enhancing the capacity of an organization to persist and maintain business operations during a crisis" (p. 1). As in any other organization, higher education institutions have daily emergencies that require immediate resolution to sustain the expectations of their constituents.

Most often, business continuity refers to disasters or emergencies that can affect the normal functions of an organization. However, normal business processes can be

interrupted by changes made in the organization. Organizational changes, such as new leadership, new positions, reduction in workforce, changes in processes flow, and changes in the delivery of the product are just a few of the changes that occur in organizations that can severely disrupt normal business functions. Tracey et al. (2017) stated business continuity needs to be a part of the normal business flow; if it is a part of the normal business processes, then people are prepared when there is a disruption. Having key personnel leave an organization, whether voluntarily or involuntarily, will cause disruption in the processes in which they worked, but it will also affect the morale of their peers. Baby boomers who are retiring from the institution have been performing their jobs and have developed tacit knowledge based on years of experience. As noted by Phelps (2017), “a tremendous amount of critical day to day business information is often stored in spreadsheets, original documents, or in the heads of a few subject matter experts” (p. 221). The departure of baby boomers will leave a gap in knowledge that will be difficult for organizations to recover unless they spend time and resources to capture the knowledge of these baby boomers before they leave.

Strategies for Business Continuity

Many will not see the benefit of planning for business continuity and will think it is a waste of resources. However, studies and organizations have found having a plan is important for returning to normal business functions quickly after a disruption (Phelps, 2017). As mentioned previously, Tracey et al. (2017) shared a strategy would be to incorporate continuity planning into the organizational culture, which would then imply regular training and updates to ensure preparedness. Treating the continuity plan as a

normal business process will support the idea that the plan is a living document and will thus be reviewed and updated regularly (Fisher et al., 2017; Tracey et al., 2017). Instead of thinking about business continuity when there is a known disaster approaching, taking the approach of incorporating it into normal processes will ensure member preparation. It will also allow for the identification of changes and gaps within processes and resources.

A final strategy for organizations would be to invest in their assets to ensure they not only create a continuity plan but also have the resources, both human and technological, to implement the plan. Organizations will need to ensure they budget and purchase technological resources to support their plan; they will also need to ensure they have human resources in place to support returning to normal functions (Phelps, 2017). Without proper funding, the organization will not be able to implement the strategy, and ultimately, will succumb to the disruption.

Summary and Conclusions

The workforce is very diverse as it includes five generations at different stages in their career paths, which thus poses several challenges to managers. In higher education institutions, the volume of baby boomers retiring from management positions will continue to increase over the next decade as they reach the age of retirement. As previously mentioned, there is little research around this topic in higher education. The proposed study fills a gap in the literature for the education industry. This case study extends the knowledge management and intergenerational knowledge transfer practices of employees at higher education institutions. This study provides recommendations to

institutions on strategies that could be implemented to help support organizations through the changes in their workforce and preserve and manage their institutional knowledge. Chapter 3 of this study includes the research methodology, design, and rationale for its use in studying how organizational managers in online universities are transferring knowledge from retiring employees to those remaining in the workforce. This study may help fill the gap in research of knowledge management and transfer among managers in higher education organizations. Additionally, Chapter 3 includes a description of the data collection, analysis techniques, and methods to maintain data reliability and validity.

Chapter 3: Research Method

The purpose of this qualitative case study was to explore how organizational managers in online universities are transferring tacit knowledge from the retiring baby boomers to their millennial replacements to maintain business continuity. The importance of knowledge management in organizations experiencing changes in their workforce continues to increase (Petrova et al., 2015). Changes in the workforce will continue as baby boomers age and continue to exit, leaving a knowledge gap for members of the workforce remaining with the organization.

Knowledge management in organizations can often be an assumed practice but not consistently operationalized. In organizations experiencing changes in their workforce, knowledge management must be a priority to ensure business continuity (Hillman & Wernert, 2017). In Chapter 3, I explain the research design that I used to explore how organizational managers in online universities are transferring tacit knowledge from retiring baby boomers to their millennial replacements to maintain business continuity. The focus of this chapter is to provide a detailed explanation of the research methodology and design used for the study. Also included in this chapter is an explanation of the researcher role, instrumentation, procedures for recruitment, participation, data collection, a data analysis plan, and addressing issues of trustworthiness.

Research Design and Rationale

This study was driven by two research questions, which were:

RQ1: How are managers in online higher education institutions capturing and retaining the tacit knowledge of baby boomers before they retire?

RQ2: How are managers in online higher education institutions ensuring business continuity as baby boomer managers retire?

The conceptual framework should answer these questions through the analysis of the behavior of transitioning employees and the actions of the managers to capture and transfer knowledge. In any organization, knowledge management is instrumental in ensuring business continuity during times of high turnover or employee transitions (Bridges, 2009; Phelps, 2017). Using the tacit knowledge of baby boomers to develop millennials provides a way to support business continuity and the professional development of the remaining workforce.

Researchers use qualitative research studies to understand the meaning behind human or social problems. According to Patton (2002), “Qualitative designs are naturalistic to the extent that research takes place in real-world settings” (p. 39). This type of research heavily relies on the researcher and their interpretation of the collected data. To understand the constructed meaning, researchers must engage directly with individuals and communities by listening to their narratives. Research can be a transformative process as the researcher engages in the study (Denzin & Lincoln, 2011). The collection of narratives can be done in a variety of ways. The data can then be analyzed to determine the meaning of the shared experiences.

This study was a qualitative single case study designed to explore how organizational managers in an online university are transferring tacit knowledge from the

retiring baby boomers to their millennial replacements to maintain business continuity. Yin (1994) defined a case study as “an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident and it relies on multiple sources of evidence” (p. 13). Denzin and Lincoln (1994) wrote, “A case study is both a process of learning about the case and the product of our learning” (p. 237). A case study allows the researcher to investigate a topic in-depth within the environment it occurs to better understand the phenomena (Hancock & Algozzine, 2017). All of these definitions fit and explain case study research and described the expected outcomes of the study.

Research designs are the plans for organizing the research study to answer the research questions, explore the phenomena, and draw conclusions (Denzin & Lincoln, 2011; Hancock & Algozzine, 2017). The selected design for this study was the logical framework based on the literature review and the conceptual framework to organize the collection, analysis, and interpretation of data relevant to the research question. In qualitative research, there are five primary designs: (a) narrative, (b) ethnography, (c) phenomenology, (d) grounded theory, and (e) case study (Yin, 2018). After considering phenomenology, grounded theory, and case study, I determined case study was the most appropriate design for the study.

According to Liamputtong (2009), “Phenomenology is the most commonly used in qualitative method” (p. 5). The phenomenological study takes the lived experience and places it at the center to determine what is special about that experience (Patton, 2002). The phenomenon is what is being studied, explained, and evaluated along with its effects

on those experiencing the phenomenon. The purpose is to understand what people go through and the effects of it on them as individuals and as a part of society. For this study, I found phenomenology was not the best option as I aimed to determine the process the organization is using, as opposed to only studying the experiences of the participants.

Ethnography research focuses on the culture of a group of people using observations as the primary data collection method (Patton, 2002). Reeves and Hodges (2008) stated, “Ethnography is the study of social interactions, behaviors, and perceptions that occur within groups, teams, organizations, and communities” (para. 2). I excluded ethnography design because of the focus on understanding the culture of a group of people and their environments (Patton, 2002), which was not the purpose of this study.

A researcher using a narrative qualitative design collects personal stories or familial stories to understand the lived experience and history of those being studied (Patton, 2002). Burck (2005) explained that “narrative design is best for studies in which the individual must give an account of themselves and their experiences” (p. 252). Researchers will often use narrative design to tell the story of those studied (Patton, 2002). The narrative design was not appropriate for this study as I sought to study what the organization was doing to prepare for the future without using a historical lens.

Grounded theory research allows the researcher to develop a theoretical framework within the research process to collect and analyze the data as a part of the study. Denzin and Lincoln (1994) defined grounded theory as “a methodology for developing theory that is grounded in data systematically gathered and analyzed” (p.

273). The creation of theory requires the researcher to collect and analyze data on a small scale but apply it to a broader population. Grounded theory was not appropriate for the qualitative study because the questions being asked were about processes that may be applied elsewhere but specifically in the organization being studied and not used to generate theory.

Role of the Researcher

This research study was completed at an online higher education institution where I am employed. I have worked at this institution for 13 years and have worked at various levels of management during that time. During that time, I have managed many employees from each generational cohort. In my current leadership role, I am still managing personnel who cross the various generational cohorts. Participants in the study were personnel managers meeting the criteria across the organization. As the researcher, I had the responsibility of being the primary investigator, data collector, analyzer, and interpreter while I was also considered an observer-participant. In this role, I interviewed managers who have employees who meet the demographic criteria to determine the measures being taken to manage knowledge through the generation shift.

Methodology

Participant Selection Logic

Case study selection is one of the flexibilities of the case study approach; it allows the researcher to look at simple cases to more complex individually or collectively (Hancock & Algozzine, 2017). Defining the case to be studied is the first step in case study research (Yin, 2018). The case in this study was the knowledge management

strategies of the identified university that support their business continuity. The university has provided education to members of the military and public servants for more than 25 years, and like other institutions, their student enrollment fluctuates.

In research studies, a sample of the identified population is selected to represent the larger population (Patton, 2002). In qualitative studies, purposeful sampling is a small group of participants who will represent the larger population. Case studies do not use samples but rather study a specific case that may or may not apply to other cases (Stake, 1995). The population for this single case study design came from the identified online higher education institution. The university has a management pool consisting of approximately 200 managers across all divisions of the institution. The institution has a multigenerational workforce at most levels, but the senior management primarily consists of members of the baby boomer generation.

Walden University's Institutional Review Board (IRB) approved the study before the data collection process started (approval number 02-03-21-0310529). This study also needed to have approval from the identified university's internal IRB to conduct research using employees of the institution. Once both boards approved, a meeting was held with members of the human resources department to discuss the data needs to narrow the participant pool to those who meet the criteria. The human resources team provided the list of managers who met the criteria and included their generation with the data file. Criteria for participants included managers who are members of the baby boomer generation, members of the millennial generation, or those who manage employees from either or both generational cohorts. All must have been employed for at least 3 years with

the institution. These selection criteria ensured representation from the identified generational cohorts, which was necessary to answer the research questions. Of the management pool, 10 managers were excluded from the participation invitation as they report to me or previously reported to me.

Case studies do not have a specified population size; the researcher collects data until saturation is reached (Patton, 2002; Yin, 2018). An initial selection of 20–30 volunteers who met the participant criteria were split into two groups. I interviewed participants until there was no longer any new information or new themes, and there was enough information that the study could be replicated, thus achieving data saturation (Liamputtong, 2009). Those volunteers who agreed to participate received the informed consent form to sign and return prior to the start of the data collection procedure.

Instrumentation

I, as the researcher, was the primary data collection instrument for this study as I collected information through the semistructured interviews of participants. The interview protocol (see Appendix A) and the interview questions (see Appendix B) were the same for all participants.

Interview Protocol

An interview protocol is a procedure a researcher follows to establish the guidelines. Interview procedure is to ensure other researchers can replicate the interview experience (Janesick, 2011).

1. Contact participants who responded to the invitation to participate and establish a meeting date, time, and place for the interview via teleconference.
2. Introduce myself to the participant.
3. Discuss the study, review informed consent, collect the participants' signed form if it wasn't already submitted, answer the participants' concerns and questions.
4. Turn on the audio recording device.
5. Begin the interview by following questions in order through the final question.
6. Follow up with any additional questions.
7. End the question sequence, discuss member-checking with the participant, and share the timeline for transcript review and response.
8. Turn off the audio recording device.
9. Thank the participant for their participation and verify contact information for follow-up and transcript verification.
10. End interview session.
11. Transcribe the interview within 48-hours of the interview and send it to the participant for review with a date for response.

12. Code the verified transcript within 48-hours of receipt of verification from the participant.

Interview Questions

1. To open our conversation, I'd like to collect a few pieces of demographic information:
 - a. What year were you born?
 - b. What is your current gender identity?
 - c. Which racial group do you identify as a member?
2. How does your team support the mission of the institution?
3. In what ways has the retirement of baby boomers impacted your team?
4. What steps have you/your team implemented to capture the tacit knowledge of baby boomers before they leave?
5. . What knowledge management practices does your team currently use to capture both tacit and explicit knowledge in your functional area?
6. Has your team implemented any new knowledge sharing practices? An example would be cross-generational sharing sessions.
7. In what ways do you anticipate expanding or improving your team's knowledge management strategies?
8. What opportunities are there for millennials to participate in knowledge transfer before baby boomers leave?

9. What type of documentation does your team have that documents the procedures being followed to manage knowledge within your functional area?
10. Are you able to share the documentation with me for review? If so, can you submit it within the next 24 hours?
11. What other information about your team's knowledge management process are you willing to share that has not already been covered?

Additional data collection instruments were any standard operating procedures and training materials participants had that documented their knowledge management practices. During the interview, participants provided examples of procedures their functional areas used to manage knowledge. Participants provided this information in either electronic or physical form either during or after the interview. The documentation served as a physical representation of the strategies managers used to manage knowledge during the transition of baby boomer employees into retirement and millennial employees assuming new responsibilities.

The interview protocol (see Appendix A) served as the guide for interviews and direct the interview flow. The interview protocol used open-ended questions (see Appendix B) to collect data from participants for the study. Hancock and Algozzine (2017) "specify that researchers should ask only open-ended questions and avoid yes/no questions or leading questions" (p. 48). Researchers also need to set the environment so people are comfortable sharing information. Setting the environment so the researcher and participant are just having a conversation can help keep the interview on track (Janesick, 2011). The researcher developed the interview questions (see Appendix B)

through the use of best practices for developing interview questions for qualitative research. Member-checking was used to validate the responses of the participants. As a part of the member-checking process, the researcher clarified her understanding of any additional documentation participants submit.

Procedures for Recruitment, Participation, and Data Collection

To study how an online university was transferring knowledge from retiring baby boomers to millennials, I used interviews as the primary data collection technique. The human resources department was asked for assistance in identifying members of the management team who met the participation criteria. Hancock and Algozzine (2017) shared identifying and selecting are critical steps to ensuring quality data collection. The participation criteria were that participants were: (a) managing members of the baby boomer generation, (b) members of the millennial generation, (c) a current employee, or (d) manage employees from either or both generational cohorts, and (e) have been employed for at least 3 years.

Eligible participants received an email with information about the study and an invitation to participate. The search identified 20 participants; a minimum of 20 participants were needed and may be enough to reach saturation. The initial recruitment did not elicit the desired number of participants, another email invitation was sent soliciting additional participation. Each participant was asked to meet with the researcher for an interview; I conducted all interviews via teleconference. Interviews were scheduled for 60 minutes for a day and at a time that was best for both parties. Interviews were scheduled and completed within a three-week window. The meeting invitation included

(a) an explanation of the study, (b) consent form, (c) information about interview format, and (d) its recording. Participants were directed to return the consent form to the researcher prior to the scheduled meeting. Following the interview protocol (see Appendix A) ensured the interview was a conversation (Yin, 2018). At the beginning of the interview, I provided an overview of the study and reviewed the informed consent form signed by the participant. If the participant remained in agreement, I proceeded with the interview and began recording.

I recorded each interview using a digital recorder and collected notes. Participants were asked if they had documentation, such as standard operating procedures or training materials, they wanted to share that can support information provided during the interview. The researcher gave each participant a pseudo-identification for anonymity and transcribed the interview notes and recordings within 48 hours of the interview and then performed member checking by sending the notes to the participant for validation and clarification. Stake (1995) shared researchers should focus on the conversation and rely on member checking to ensure they do not waste their time with the participant.

Participants submitted any supporting documentation they wanted to share within 24 hours of the interview. I reviewed the documentation along with the transcription of the interview notes. As Hancock and Algozzine (2017) stated, “documents provide a rich source of information with which to augment data collected through interviews” (p. 58). The documents provided information about what processes managers have implemented within their functional areas. After participants reviewed their interview transcript and questions about their document, their participation was considered concluded.

Data Analysis Plan

Data analysis is the process that happens after the data collection process to ensure the research study does not stall; the researcher must have a plan (Yin, 2018). Some research methodologies wait to analyze data after all data is collected. However, qualitative case studies are analyzed on an iterative basis as the researcher works with the data constantly, adding data, and then working to code that data (Hancock & Algozzine, 2017). In case studies, data analysis is an important step so the researcher can identify saturation; if they wait to analyze the data, they will not know when they have gathered enough data. The researcher drives the data collection process as they interview and asks questions of participants to gather more information for the study.

I used Yin's (2015) five-steps for analyzing qualitative data by (a) compiling, (b) disassembling, (c) reassembling, (d) interpreting, and (e) concluding. Additionally, pattern matching and logic models were useful in analyzing the data. My qualitative study started once both IRBs were approved. Immediately after interviews with participants, notes were transcribed and sent to the participants for member checking to ensure accuracy. Once participants responded with their feedback on the transcription, the data was recorded for coding through the use of NVivo 12 software. Yin (2018) shared analyzing case study data is very challenging for novice researchers, and computer-assisted tools can help identify themes in the data.

Yin (2018) acknowledged "data analysis is one of the least developed aspects of doing case studies" (p. 165). As a novice researcher, using software to assist in the analysis of the data for the identification of themes was important to ensure the research

study does not stall. Hancock and Algozzine (2017) shared the use of computer software is encouraged as a way to help researchers organize and categorize data collected. As case studies vary based on the specific case and the themes had just as much variation. Using computer-assisted tools helped in the analysis because they offer such a diverse array of tools (Yin, 2018). Researchers conduct data analysis in qualitative case studies to identify themes across the data. Patterns or themes emerge as a researcher manipulates the data and spends time with the data. For a novice researcher, using NVivo as a tool to aid in identifying and searching for themes across the collected data is an imperative step in the process. In this stage, it is important to control bias, which is why many researchers use a standard protocol to help reduce it. As long as the researcher follows the data, using computer software and logic maps should aid in eliminating bias during this phase).

The final part of the analysis was to create a logic model (see Appendix C) to present the themes and concepts in a format that supports possible recommendations based on the interpretation of the data. Yin (2018) explained logic models can share complex causal events to illustrate actions that can be operationalized. The logic model should show strategies in place currently across the institution based on information and documentation shared by participants. A logic model displayed any recommended procedural changes identified in the study. An organizational logic model traced events that occur within a single organization. The logic model was used as a visual representation of the data collected as a part of the study. The logic model components included the components below:

- situation: research questions were illustrated

- input: interview questions were outlined
- output: participant responses to questions
- outcomes: themes identified based on responses and artifacts
- recommendations: proposed recommendations based on analysis of themes extracted from the data

The logic model's final design was dependent on the data from the study, but the aforementioned components were represented. As this was a study of a single organization and was studying procedures in the organization, using a logic model was an ideal way to represent the data.

Issues of Trustworthiness

Credibility

Credibility is identified as the measures taken by researchers to ensure the rigor of the data collection methods, training, and preparation of the researcher, and the value-added by the research inquiry itself (Patton, 2002). Yin (2018) shared the credibility of explanatory case studies is important to ensure the researcher does not draw improper inferences. Researchers need to use methods to validate the data collected to ensure the constructs drawn are correct. There are various strategies qualitative researchers use to establish credibility in their study such as: triangulation, member checks, prolonged engagement, audit trail, and peer review (Hancock & Algozzine, 2017; Stake, 1995).

To establish credibility in this study, I used the member checking strategy. This allowed participants to validate the information they shared during their interview

(Hancock & Algozzine, 2017; Janesick, 2011; Stake, 1995; Yin, 2018). Additionally, I used any document the participant's shared to demonstrate what their team had regarding knowledge management, which includes knowledge transfer between employees. Using these sources of data verification allowed for triangulation of the data to support inferences to be made and supported.

Transferability

Transferability is the ability of the study findings to be applied to other situations (Patton, 2002). Yin (2018) expressed the generalizability of the research beyond the current study is an important validation step for researchers. The location of this study was at one online institution, and other higher education institutions could replicate the study. Hancock and Algozzine (2017) stated, "transferability is evident in the use of multiple sources of data sources to address questions being investigated and findings being documented" (p. 74). An interview protocol was used to collect data from participants and then the use of member checking and document review, for those with documentation, to validate the information shared. A final strategy to support transferability was to provide rich details about the population, data collected, and results.

Dependability

According to Hancock and Algozzine (2017), dependability should be evident in how the researcher documents changes throughout the study. Yin (2018) explained this final test is whether a future researcher can replicate the study procedures and formulate the same results. A researcher's techniques influence the results of qualitative research

studies (Stake, 1995). Following the interview protocol (see Appendix A) with each participant supported a consistent data collection method.

As Yin (2018) stated, “the goal is to minimize the errors and biases of the study” (p. 46). A way to do this to provide thoroughly detailed descriptions of the procedures for the study. Stake (1995) shared, “to gain the needed confirmation, to increase credence in the interpretation, and to demonstrate the commonality of an assertion, researchers can use triangulation protocols” (p. 112). In this study, I used methodological triangulation, using both interviews and documentation reviews to support information gathered directly from the participants. Additionally, the use of a logic model to explain how managers are managing knowledge, along with modeling recommendations, supported documenting the dependability of the study.

Confirmability

The confirmability of qualitative research is ensuring the researcher’s objectivity throughout the research process (Cutcliffe & McKenna, 2004). The researcher has to critically analyze their actions throughout the study to identify instances where their feelings may be influencing the study. Hancock and Algozzine (2018) shared “confirmability is supported by a clear internal logic that is evident across goal and purpose, method, findings, and conclusions, and has no potential evidence of bias” (p. 74).

Following the data collection and analysis protocol minimized researcher bias. Using strategies such as triangulation and member checking supported the confirmability of the study and prevented the researcher’s feelings from impacting the study. Patton

(2002) shared objectivity is critical in science and research, but when a human is the research instrument, objectivity is challenging.

Ethical Procedures

This qualitative case study followed the guidelines as outlined by Walden University. No research study activities happened before the two IRBs approved the study. Once approval was granted, the data collection process began. The planned research location was my place of employment; it was prudent to exclude any managers who currently or previously reported to me as their supervisor. To identify participants, I used the human resources department to identify participants who meet the criteria and the exclusionary criteria. Identified potential participants were contacted via email and invited to participate in the research study.

If participants agreed to participate, they were sent a meeting request that included information about the study, the informed consent form and a meeting place or phone number if via teleconference. Interviews followed the interview protocol to ensure consistency and establish trustworthiness of the study. Participants were identified in notes, NVivo, and any other study documents via an alpha-numerical code to ensure their privacy and anonymity. Any documentation they provided for their team was also coded to ensure anonymity.

During the postinterview process, I transcribed the interview notes and then sent them to the participants for member checking. After the participants provided their feedback on the notes, I entered the information into NVivo to organize the data into codes and identifying themes. All physical documentation was secured electronically and

shredded. All data will be maintained through electronic storage for a minimum of five years.

Summary

An overview and description of the research methodology and design on the strategies managers of an online university are using to manage knowledge as baby boomers retire and millennials take over their roles was provided in this chapter. As Yin (2018) stated, “Research design is a logical plan for getting from here to there, where here may be defined as the set of questions to be addressed, and there is the set of conclusions about the questions” (p. 26). Also found in this chapter was a research plan that shaped how the researcher collected data from participants to answer the research question. Included in this chapter was an explanation of the researcher’s role, participant description, procedures for recruitment, participant selection, and instrumentation. Other topics outlined were data collection, data analysis plan, ethical procedures, and other areas to show trustworthiness of the study to allow the researcher to ensure that they have constructed a sound plan.

Planning the research requires the researcher to think about each step of the process. As explained by Hancock and Algozzine (2017), Chapter 3 provided the descriptions of expectations as they relate to the research study. Each section in this chapter required documentation of processes that support an ethical approach to the research study. This chapter provided the expectations of the research plan for the research study. Outlining the research methodology for this study sets the stage for the

next chapter that shares the results of the study. Chapter 4 includes a description of the data and results of this study.

Chapter 4: Results

The purpose of this qualitative case study was to explore how organizational managers in online universities are transferring tacit knowledge from the retiring baby boomers to their millennial replacements to maintain business continuity. I used semistructured interviews with managers from three generations (baby boomer, Generation X, and millennial) to gather data to answer the research questions. This study was based on two research questions:

RQ1: How are managers in online higher education institutions capturing and retaining the tacit knowledge of baby boomers before they retire?

RQ2: How are managers in online higher education institutions ensuring business continuity as baby boomer managers retire?

This chapter presents the data collected, analysis of results, and findings of the study based on the research questions, conceptual framework, themes from the literature, and results from the data analysis. The purpose of this case study was to explore how organizational managers in an online university were transferring tacit knowledge from the retiring baby boomers to their millennial replacements to maintain business continuity. Using knowledge management strategies to preserve institutional knowledge is imperative for maintaining business continuity (O'Reilly et al., 2018). Organizations that secure their institutional knowledge may insulate themselves from slowing business operations in the future.

Research Setting

Participants were invited to join the research study as outlined in Chapter 3. Interviews were held via conference call through Zoom, audio-only, and were recorded via Zoom and a digital recorder. Participants were able to dial into the conference bridge from their preferred private location for the 60-minute interview. All participants except one took the interview from their home office as most are now working remotely. One participant chose to take the interview in their office at the university because they still go into the office regularly. One participant lost childcare just before the interview but wanted to continue, so there were a few interruptions but no ill effects in the interview.

During the conversations, most of the participants mentioned an event in 2018. Several tenured managers and employees took an option to leave the organization in a voluntary reduction in force. That event affected many departments across the organization, and in some cases, the effects are still being felt. All participants who mentioned the event indicated they had increased their knowledge management strategies to capture explicit knowledge because of it. The participants felt very comfortable discussing the changes and the impact on their teams and on them personally.

Demographics

The participants were recruited based on the participant criteria and were all managers. The solicitation of participants was based on the potential participant list that the human resources department provided. The participant criteria included that the participant must be (a) a member of the baby boomer generation, or (b) a member of the millennial generation, or (c) manage team members who were members of the baby

boomer generation, or (d) manage team members who were members of the millennial generation. In addition, the participant must be employed at the university for at least 3 years and not have reported to me. I sent invitations to 50 potential participants: 20 baby boomers, 20 millennials, and 10 Generation Xers.

The study participants included eight baby boomers, eight millennials, and four Gen Xers. The inclusion of the Gen Xers was important to capture the perspective of managers who manage members of the other two generations for a well-rounded perspective. The racial makeup of the participants is outlined in Table 2.

Table 2

Participant Race Demographics

Racial group	<i>n</i>	%
Caucasian	16	80
Black	2	10
Asian	1	5
Latino	1	5

Data Collection

The data collection was conducted as outlined in Chapter 3 and approved by both Walden University and the research site's IRBs. I worked with the human resources department to identify a list of managers who met the criteria. The human resources department confirmed each participants' years of service and their generation. I was provided a list of 109 managers who met the participant criteria; that list was then categorized by generation. Recruitment of participants commenced with emails being sent to 50 potential participants, 20 who were classified as baby boomers, 20 who were

classified as millennials, and 10 who were classified as Gen Xers. As participants responded to the invitation, their interviews were scheduled, and they were sent the informed consent information with the request to review and return the form before their interview. Upon receiving the participant's affirmation of participation, they were then assigned a pseudonym for identification (e.g., PT1, PT2, PT3). This code was used to match the participant consent list to track consent and the participant information and was only accessible to me.

Once consent was received, I met with each participant during their scheduled meeting time based on their availability. Interviews were scheduled for 60 minutes, none went more than the allotted time, and all were conducted over a 3-week timeframe. Interviews were held using the teleconference (audio-only) line through Zoom; all were recorded through Zoom and on an EV/STR digital recorder. Two recording devices were used in case there was a technological issue with one of the devices. The recordings from both Zoom and the digital recorder were downloaded and saved on the secure drive.

At the beginning of each interview, I reviewed the purpose of the study, thanked participants for returning their consent forms, and reminded them they could stop or withdraw from the study at any time. Participants were asked if they had any questions and if they were ready to begin the interview. Upon their confirmation, I informed them I would commence recording, and both recording devices were started. Interviews followed the interview protocol (see Appendix A), and the approved interview questions (see Appendix B) were asked in order as designed. An additional question was asked for each participant who shared they used documentation as a part of their knowledge

management strategies; the question was regarding how frequently their documents were updated. Once all questions were asked and the participant finished talking, I thanked them for their time and participation in the study; I then informed them I would be stopping the recording, ending the interview.

After each interview, I took a few minutes to journal my thoughts to document my response and points of interest. Each evening after the interviews, I reviewed and edited the interview notes based on the recordings to ensure I captured the sentiment of each participant's response. Interview notes were then sent to the participants the following day for their review, response, affirmation, with a reminder to provide documentation if they had documents to submit and had not already done so. All participants provided responses to the notes and their documentation within the allowable time. The interviews were executed without any problems.

At the end of the call, I reminded participants of my contact information and encouraged them to reach out if they had any questions or concerns. I also provided the next steps for me relating to the study and shared they would receive a copy of the executive summary once the study and dissertation concluded. I conveyed to participants their privacy was a top priority and any submitted documentation would be scrubbed of any identifying information. They were reminded their personally identifying information was secure because a pseudonym was used, and I would be the only person handling all information.

Data Analysis

The source of the data for this study were collected through semistructured interviews. All participants were asked the same questions (see Appendix B), and the interview protocol was followed for all participants. Interviews were recorded and then transcribed using NVivo software. I sent the interview notes to the participants for member checking for completeness and to ensure I captured the sentiment of their responses. Once the participant confirmed or provided clarification on the notes, they were then imported into NVivo. I used NVivo for the coding process; many of the responses were similar.

The initial cycle of the coding process was to identify keywords and phrases from each participant's responses. This action created a list of 45 nodes classified as keywords, and by using NVivo 12, I was able to see the frequency of the words or phrases across all participant responses. Using the frequency, I was able to identify the words and phrases used the most across the interview responses. The top 10 keywords or phrases and their frequency are displayed in Table 3. Words and phrases with a frequency of less than five were reviewed, captured, and included in the next cycle. It was essential to keep the words identified less frequently as they provided information about the respondent's perspective, even if it is only a solitary perspective.

Table 3*Keyword Frequency*

Keywords	Frequency
Future	23
Collaboration	16
Meetings	15
Knowledge sharing	13
Standard operating procedures	13
Training	13
SharePoint/Shared files	10
Mentor relationship	9
Cross-training	8
No planning	6
Strengths/skills	6
Transparency	6
Boomer retirement	6

The next cycle of coding was to classify the keywords into categories to identify themes across the responses. The classification of the keywords helped to move from a detailed view to an expanded perspective. During this cycle, six categories were identified as follows: (a) trainings, (b) documentation, (c) planning, (d) development, (e) knowledge sharing repository, and (f) baby boomer retirement impacts. These categories were used to expand to findings across the data as connected to the research questions. Table 4 highlights the findings, codes, and keywords identified through the analysis cycles.

Table 4*Coding and Findings*

Findings	Category	Keywords
Knowledge management practices	Documentation Knowledge sharing repository	Best practices/FAQs, emails, handbooks, playbooks, policies, process maps, standard operating procedures, meetings, mentor relationships, SharePoint, shared files, slack, sprints, transition meetings
Employee development	Development Trainings	Different outlook, feelings, preparation, relationships, strengths/skills, coaching, social
Future planning	Planning Baby boomer impacts	Future initiatives, succession planning, change/improvements, Generation Z, no plans

Finding 1: Knowledge Management Practices

Throughout the conversations with participants, it was evident capturing and sharing explicit knowledge has been a priority for most of the departments represented. Each participant provided information on how they manage explicit knowledge, where documentation was stored, and how accessible the documentation was for the team members. Most were able to provide tangible documentation to support how they captured information and the frequency of updates. Consistently, there did not appear to be a focus on capturing tacit knowledge from any team member, not just members of the

baby boomer generation. Participants also acknowledged there was not a systematic institutional process nor policy regarding knowledge management.

Knowledge sharing is an important practice for most teams, according to the participants. Participants may not have explicitly said they focused on capturing tacit knowledge, but the experience they described allowed for both tacit and explicit knowledge to be shared. A few examples of information shared ranged from tips and tricks, process and policy reviews, and problem solving techniques. All identified strategies in their teams to ensure people have the opportunity to share information. Team meetings and informal mentor relationships were the most common knowledge-sharing practices among the participants. Nine participants referenced collaboration 16 times throughout their interviews. Knowledge sharing allows an opportunity for team members to collaborate on tasks and projects. Only three participants, PT4, PT6, and PT18, specifically mentioned holding transition meetings with retiring team members.

Finding 2: Employee Development

Participants consistently mentioned knowledge management practices were critical to employee development. All acknowledge to develop new and existing employees, you have to share captured knowledge. Each participant discussed their training and development practices to help develop their employees and managers. Seven of the participants noted they cross-train employees and managers as one of their knowledge management strategies. PT19 shared, "I cross-train my staff, so we do not have a single point of failure." This same participant indicated her team had not experienced any knowledge loss due specifically to baby boomer retirement; however,

they did suffer a loss due to the resignation of an employee with more than 15 years of service.

Additionally, several participants discussed how purposeful knowledge-sharing sessions have helped develop soft skills among their team members. PT15 shared, “the knowledge-sharing sessions in our team meetings has helped team members build relationships and helped the team build trust amongst each other.” PT1 shared, “there is a social aspect to their sharing practices to support building trust and relationships amongst team members.” Knowledge sharing allows team members to showcase their skills to their teammates and become a resource for their areas of expertise (PT1, PT13, PT14, PT15).

Finding 3: Future Planning

Several participants shared they needed to do work for the future to ensure their knowledge management practices would decrease any vulnerabilities against knowledge loss. Three participants discussed succession planning as a part of future planning, but they currently did not have a formalized plan. Three other participants recognized a need to plan differently for members of Gen Z to move into management roles. They have team members from this generation and know their training and development needs are different from those historically provided. Four participants indicated they had no plans for their future knowledge management practices but indicated they feel improvements could be made after the interview.

Discrepant Case

The only discrepant case found across the data was the feeling of preparedness for baby boomer retirement. About 88% of the millennial managers and 25% of the Gen Xers interviewed felt they were prepared for when baby boomers retire using their current knowledge management strategies. In contrast, all of the baby boomer managers felt more was needed to prepare for their retirement.

Evidence of Trustworthiness

Credibility

Developing a plan to ensure the credibility of case study research is vital as the validity of the qualitative study is constantly being questioned (Yin, 2015). As the researcher is the research tool, it is essential to establish protocols that can be followed by others and thoroughly documented. Researchers need to use methods to validate the data collected to ensure that the constructs drawn are correct (Yin, 2018). Analysis of interview notes and documentation was completed for triangulation to address credibility questions in the study.

Data collection efforts for this study, closely aligned with the strategies outlined in Chapter 3, following the interview protocol and the procedures to identify participants allowed participants to feel comfortable responding to the interview questions. Each participant was provided and responded to the informed consent before their scheduled interview. At the beginning of the meeting, each person was given the background of the study and allowed a chance to ask questions before the recording and interview started. I captured notes during the interview and took care to record and capture the participant's

responses. The interview notes were then sent to the participants for member checking. They were given a chance to provide corrections as they felt appropriate to capture the sentiment they were sharing during the interview. Allowing participants to validate the information they shared during their interview through member checking is another way to secure credibility in a study (Hancock & Algozzine, 2017; Janesick, 2011; Stake, 1995; Yin, 2018). NVivo was used to transcribe the recordings and identify keywords, categories, and themes from the interview notes.

Transferability

Transferability of a study refers to the generalizability of the study and whether the study and findings can be applied to other populations (Patton, 2002; Yin, 2018). Although this study was performed at one university, data were collected through interviews and documentation the participants submitted, following the interview protocol and data collection methods outlined in Chapter 3. Providing rich details for all the processes, methods, and analysis of the study will aid others in replicating the study in an alternative environment (Hancock & Algozzine, 2017). The purpose of the study was to understand how the organization manages knowledge to prepare for the retirement of baby boomers. This topic is timely as more baby boomers move into retirement across industries, changing the landscape for many organizations.

Dependability

To ensure the dependability of this research study, I followed the interview protocol and procedures outlined in Chapter 3. The interview questions and connected data collection methods were accomplished through telephone conference calls and

recorded to ensure accuracy of transcripts to support dependability. I documented each step of the process to create an audit trail, allowing for assurance all steps were followed in the order outlined for consistency. Providing a complete detailed explanation of the methods used enhanced the dependability of this study.

Confirmability

Qualitative researchers must ensure their objectivity throughout the research study because they are one of the main instruments in the study (Hancock & Algozzine, 2017). To establish confirmability, I provided detail of the procedures, processes, and analysis during the data collection process and observations to be reflective throughout the study. Member checking ensured the interview responses were captured accurately and allowed participants to provide clarification. Additionally, triangulation using interview notes and documentation from the participants allowed for validation.

Study Results

The purpose of this qualitative case study was to explore how organizational managers in online universities are transferring tacit knowledge from the retiring baby boomers to their millennial replacements to maintain business continuity. The findings and subfindings were derived from the interview questions aligned with the research questions:

RQ1: How are managers in online higher education institutions capturing and retaining the tacit knowledge of baby boomers before they retire?

RQ2: How are managers in online higher education institutions ensuring business continuity as baby boomer managers retire?

The data were collected from interviews with the 20 participants, and Table 5 illustrates the relationship between the research questions, findings, categories, and keywords.

Table 5

Coding and Findings

Research question	Findings	Category	Keywords
RQ1. How are managers in online higher education institutions capturing and retaining the tacit knowledge of baby boomers before they retire?	Knowledge management practices	Documentation knowledge sharing repository	Best practices/FAQs, emails, handbooks, playbooks, policies, process maps, standard operating procedures, meetings, mentor relationships, SharePoint, shared files, slack, sprints, transition meetings
RQ2. How are managers in online higher education institutions ensuring business continuity as baby boomer Managers retire?	Employee development	Development trainings	Different outlook, feelings, preparation, relationships, strengths/skills, coaching, social
RQ2. How are managers in online higher education institutions ensuring business continuity as baby boomer Managers retire?	Future planning	Planning baby boomer impacts	Future initiatives, succession planning, change/improvements, Generation Z, no plans

Finding 1: Knowledge Management Practices

The conversations with participants identified teams across the organization had several knowledge management strategies to capture explicit knowledge. All participants confirmed there is not a prescribed process across the institution for knowledge management. The level of concern regarding knowledge management varied by participant and their experience. Those who had not experienced knowledge loss did not have as many concerns as those with experience. Most of the conversations regarding knowledge management focused on three subfindings: documentation, storage, and knowledge sharing.

Documentation

The easiest process of capturing knowledge is through documentation (Davenport & Prusak, 1998). All participants shared they were capturing knowledge through some form of documentation based on their team's needs and preferences. Table 6 illuminates the forms of documentation participants reported using to capture explicit knowledge. Although all use documentation to capture knowledge, most (70 %) did not have a systematic process of updating their documentation. Several indicated they update documents as needed, train new hires, or change a process or policy. Six participants shared they do review their documentation at least on an annual basis, and only one participant (PT1) indicated the team has an audit process to capture what documentation is reviewed and when. The most frequently used documents were standard operating procedures, which are used to document process steps for each team.

Table 6*Forms of Documentation*

Documents	Frequency
Standard operating procedures	12
Best practices/FAQs	4
Playbook	4
Policies	4
Process flows/maps	4
Handbooks	3
Emails	2

Knowledge Storage

Another area that varied from person to person was where they stored shared information for accessibility. The most frequent place identified for storing shared documentation was on either a SharePoint site or a folder on a shared drive. Storing documentation in a shared location is the easiest way to make it accessible for all who need the documentation. PT6 shared, “when a senior leader was preparing to retire, she created a folder on the shared drive and dropped files for those who were assuming her former responsibilities.” Making information accessible was a crucial component in knowledge management practices (Davenport & Prusak, 1998; Lehman, 2017). Many of the participants identified using the shared locations to organize the documentation so others can be self-sufficient and manage their work. Table 7 captures the storage locations identified by participants.

Table 7*Storage Locations*

Locations	Frequency
SharePoint or shared drive	11
Sales force	3
Slack	3
Email storage	3

Knowledge Sharing

The conversations concerning knowledge-sharing practices demonstrated all participants have some way of sharing knowledge. For all participants, the opportunities for knowledge sharing were not restricted to people of specific generations, but all team members were welcomed. PT10 explained, “knowledge sharing is not specifically generation-focused, but is happening and is more related to tenure.” Half of the participants identified meetings as the place where most knowledge sharing takes place between team members. PT8 shared, “she specifically provides time for her managers to share new information, explore questions, problems, ideas, during a designated time in the meeting.” Team meetings were most often mentioned as the venues where knowledge sharing occurred, but participants also mentioned one-on-one meetings between supervisor and employee. Three participants (PT1, PT14, PT16) mentioned sprints as an opportunity for knowledge sharing and knowledge building in a collaborative approach. A sprint is a short time-based period that a team works to complete specific items within a project (Rehkopf, 2021). These sprints allow multiple participants to engage in a process that encourages information sharing on a topic based on knowledge, perspective,

and experience. Opportunities to collaborate were identified as an essential aspect of knowledge sharing as 45% of the participants referenced collaboration in their responses. Additionally, four participants shared they specifically held transition meetings for employees who are preparing to retire.

Mentor Relationships. Sharing tacit knowledge is an essential aspect of successful knowledge management practices (Lehman, 2017). A way to share tacit knowledge is through mentor relationships, where people are working closely together and building a relationship that is mutually beneficial. Eight of the participants shared they use mentor relationships to help share information and develop their employees. All except two participants (PT18 and PT20) indicated these relationships were informal and not a requirement for any team member. PT20 explained, “he had the opportunity to have a Vice President as his mentor when he moved into management, and this helped him get acclimated to the expectations of his new position.” PT18 shared, “they maintain a peer mentoring program for team members at all levels; this program is for individuals that have a shared interest and may or may not be professional development.” Most of those with informal mentor relationships indicated they would like to create formal mentor relationships in the future and would support an organizational approach.

Technology. Several participants mentioned the use of technology to share information during their interviews. PT1 shared, “using Slack channels has helped build team connections and provide both a formal and informal avenue for information to be shared.” PT14 also shared, “the use of Slack channels in academic schools has helped share information with people.” Slack is a communication software, much like Skype,

IM, used by people and organizations as an alternative to email. Additionally, Salesforce was another technological resource identified as being used for knowledge-sharing purposes. Two participants (PT3 and PT5) mentioned the work being done to capture and identify knowledge through the system development process. Although most of the conversations were for internal purposes only, the conversations about Salesforce were for internal and external knowledge-sharing.

Finding 2: Employee Development

Training and development are important to the development of an organization (Fried, 2015). Explicit knowledge is captured through various forms of documentation and shared via training materials to team members (Denzin and Lincoln, 1994, 2011). During the interviews, 19 participants referred to using explicit knowledge as a part of their training materials for new employees and managers. Training materials may vary across each department, but there was a clear emphasis placed on providing training materials and opportunities for employees. Most of the conversations focused on the training of new employees and managers; there was less information shared about the continual development of managers.

Cross-Training

Cross-training was emphasized by half of the participants; those who indicated managers and employees were cross-trained shared they had lost institutional knowledge through an employee departure and were insulating their organization from not being able to continue to operate. PT7 shared, “they cross-train, so there isn’t a single point of failure, which they learned from experience when a senior manager left the team.” Cross-

training ensures there is a shared knowledge of processes and practices and supports the organizations' ability to continue to function in the event an employee leaves the organization. Several participants also shared they have to cross-train due to team size. PT16 shared, "as a small team, they have backups for every team member to allow for people to take time off without having to worry about responsibilities not being completed." As participants discussed cross-training, all except one participant (PT18) focused on the staff level, not the manager level. Two participants indicated they focus on ensuring there are identified backups to support each other at a management level.

Relationship Building

Additionally, four participants indicated their knowledge management practices provide an avenue for relationship development across their team. PT15 shared, "an unintended advantage of the team sharing time is that people started trusting each other because they were being authentic and sharing personal information as well as professional information." PT1 said, "We use Slack to provide a social chat, so people can connect personally, which helps remove barriers so they can collaborate more openly professionally." PT7 shared, "she believes creating a network, and building relationships is important to an individual's growth and development." These participants found knowledge sharing has a social component that is beneficial for the organization and the employee.

Strengths and Skill Building

A few participants discussed using knowledge-sharing sessions to support employee development. PT5 indicated, "he likes to use people's strengths and give them

an opportunity to shine.” PT15 said, “she uses their strengths to help build trust across the team and allow opportunities to demonstrate their strengths/skills to team members.”

Providing an avenue for people to share their strengths supports their development along their career path but is equally important to allow for opportunities to develop new skills.

PT15 and PT20 also explained they work with their managers and staff to identify developmental needs as a part of their career path development.

Finding 3: Future Planning

One of the interview questions asked participants to address their future plans for their knowledge management strategies. Only one participant (PT12) indicated she had no plans to make any changes to her strategies. All other participants indicated they realize there were adjustments they could make to current practices. PT14 shared, “he would like to see more physical and virtual collaboration space for individuals to have more opportunities to be creative and have opportunities to create and share knowledge.” In preparing for the future, PT3 indicated, “she is planning to incorporate the perspectives of new employees to ensure continuous improvement and their learning needs are captured.” PT11 noted, “knowledge sharing at the staff level is solid, but at the management level, more work is needed.” Several participants realized they had strategies for knowledge retention and sharing for their staff but lacked strategies at the management level.

Generation Z

Three participants, PT10, PT18, PT20, shared they have members of Generation Z on their teams. PT20 shared, “we have noticed they ingest information differently than others, and we have had to change how we train and share information.” PT18 acknowledged “that soon they will have managers who are a member of Generation Z so they will need to consider the best ways to share knowledge to prepare them for management.” Preparing for the future is key to developing business practices that support continuity strategies (Tracey et al., 2017).

Succession Planning

As participants thought about the future, four participants indicated a part of the planning needed to include succession planning. The interesting point about this was that the comments came from three millennials and only one baby boomer. PT19 indicated her team has completed an informal succession planning process but did not have it formally documented. The others, PT4, PT10, PT15, indicated they have formalized their succession planning and use knowledge management strategies to ensure bench strength to support the team when members of the management team are out of the office or leave the team. None of the other participants mentioned using succession planning as part of their development of their management team or their knowledge management strategies. The lack of succession planning is not a surprise based on the lack of succession planning across higher education organizations, as shared in Chapter 2.

Discrepant Findings

The feeling of preparedness for baby boomer retirement varied across the participants. All baby boomers felt more needed to be done to prepare for their retirement and for anyone of that generation's retirement on their team. PT9 shared, "we have not designed specific goals around knowledge management and what we should be doing to prepare people for the future." PT14 shared, "as a distributed organization, we need to be more intentional and determine a systematic approach in our knowledge management practices across the institution." Alternatively, most millennials and one of the Gen Xers felt they were prepared for baby boomer retirement using their current knowledge management strategies. This group also indicated they would have little to no impact from baby boomer retirement because all except one did not have baby boomers on their team.

Summary

Chapter 4 included a complete description of the data collection and analysis processes, including instrumentation, transcription, and the thematic identification process. Yin (1994) explained case study research is appropriate to explore real situations by collecting and analyzing sources of evidence to provide detailed descriptions of the phenomenon. Three overarching findings were identified from the data as a response to the two research questions. Knowledge management practices was the finding identified to address research question one: How are managers in online higher education institutions capturing and retaining the tacit knowledge of baby boomers before they retire? Employee development and future planning were identified as findings to address

research question two: How are managers in online higher education institutions ensuring business continuity as baby boomer managers retire? Additionally, an inconsistency in preparedness was identified amongst the participants; all baby boomer and most Gen Xers felt more needed to be done to prepare for baby boomer retirements while most millennials and one Gen Xer felt they were prepared.

In Chapter 5, an interpretation of the findings to support, compare or extend the scholarly knowledge of the discipline and organizational practices. The chapter also includes recommendations for future research based on the study, limitations, and findings. The chapter includes the study's limitations and how those impacted the overall study findings. Additionally, it includes recommendations for application in the organization.

Chapter 5: Discussion, Conclusions, and Recommendations

Managing institutional knowledge through the generational shift and retaining employees are critical areas of concern for managers in higher education institutions (Dwyer & Azvedo, 2016; Hillman & Werner, 2017). The specific management problem was managers in higher education institutions were having challenges maintaining business continuity as they lose institutional knowledge as baby boomers retire and millennials assume those positions (Barton, 2019; Hillman & Werner, 2017; Kuhl, 2014). The purpose of this qualitative case study was to explore how organizational managers in online universities were transferring tacit knowledge from the retiring baby boomers to their millennial replacements to maintain business continuity. Thus, the nature of this study was to understand knowledge management strategies for managers at an online university.

I collected data from 20 managers at an online university using semistructured interviews and NVivo 12 to analyze the data. The analysis produced three overarching findings: knowledge management practices, employee development, and future planning. First, a key finding was all participants had knowledge management strategies to capture explicit knowledge, but most participants did not identify specific strategies to capture and transfer tacit knowledge. A second key finding was all participants found development necessary, but most did not have specific management development programs and strategies. Finally, most participants reiterated the importance of mentor relationships in knowledge management, career development, and future planning.

Chapter 5 includes the interpretation of findings, limitations of the study, recommendations, implications for positive social change, theory, and practice.

Interpretation of Findings

The study's findings concluded managers from all generations feel strategies to retain and share knowledge are essential and should be an institutional priority. I presented an interpretation of the study's findings to confirm and extend knowledge management studies. During the interviews, participants shared their current and planned actions to manage knowledge for their respective areas to support business continuity and support their workforce. I discussed the primary findings and subfindings in the data and their alignment with the research questions in Chapter 4, and I further examine the interpretations of the findings in this chapter.

Finding 1: Knowledge Management Practices

According to the data analysis, 100% of participants have knowledge management strategies that capture and document explicit knowledge for their respective teams. The documented explicit knowledge is instrumental to the organization's operations and decision-making process (Lehman, 2017). Of the participants who captured explicit knowledge for their team, 55% indicated they stored documents in an accessible location for team members. Accessibility is imperative for knowledge sharing and retention; if the information is not accessible, then it is not useful for others (O'Reilly et al., 2019). Additionally, 100% of participants recognized knowledge-sharing practices were imperative to business continuity, employee development, and relationship building for their teams.

The purpose of this qualitative case study was to explore how organizational managers in online universities are transferring tacit knowledge from the retiring baby boomers to their millennial replacements to maintain business continuity. Participants may not have indicated tacit knowledge was captured, but they did indicate they shared tacit knowledge through their various knowledge-sharing practices. Tacit knowledge is shared through relationships, conversations, and on-the-job training (Petrova et al., 2015). Several participants, 40%, stated they use mentor relationships to share knowledge with their team members; however, only 25% of them have formal mentor relationships. Davenport and Prusak (1998) stated “knowledge is generated and shared by informal, self-organizing networks within an organization that over time may be formalized” (p. 7). Across all participants, 40% mentioned the importance of mentor relationships and the need for an institutional approach to prepare future leaders.

As an online university, the use of technology is imperative to the organization’s business functions. Technology was mentioned by participants (25%) as a part of their current or future knowledge management strategies. Davenport and Prusak (1998) stated, “The medium is not the message, though it may strongly affect the message” (p. 4). Participants shared using multiple forms of media (i.e., Zoom, Adobe, Slack) to facilitate knowledge sharing across their teams. As a distributed organization, the use of technology is necessary for normal operations and to share and create knowledge.

As mentioned, knowledge management was identified as a key strategy for the organization, and participants shared they have strategies to capture explicit knowledge. However, what was not clearly outlined by all participants were their knowledge

management strategies specifically for their management team members. O'Reilly et al. (2019) stated, "Knowledge transfer is composed of several activities across the entire ecosystem" (p. 246). As participants shared their perspectives, only 10% said they specifically had strategies for their management team; most of the shared information referred to staff.

Finding 2: Employee Development

Personnel development is essential to an organization's growth and continuity (Webb et al., 2017). Employees seek to improve their skills and learn new skills as they travel along their career journeys. Most of the participants, 95%, mentioned training materials were provided to their employees. Providing career development opportunities for employees supports the organization's priorities, promotes investment in personnel, and keeps the organization competitive (Fried, 2015). Regarding ongoing development needs for team members and managers, the subfindings were cross-training, relationship building, and strengths and skill building.

Participants connected knowledge sharing with employee development through the identified subfindings. Of those who spoke about cross-training employees, only two focused on cross-training their managers. Participants identified cross-training, relationship building, and strengths and skill-building were important for career development; however, there was no specific focus from many participants for their managers. Employee retention strategies that include career development are vital to maintaining institutional knowledge (Tetik, 2016). Several participants identified there were gaps for their management team.

Finding 3: Future Planning

Several managers mentioned they had not been thinking about their team's future needs. A future need identified by several was the capability of being more collaborative as an organization. Bartz et al. (2017) explained, "There are differences in the way each generation views the world of work, and their varying perspectives are an asset to diversity and problem solving" (p. 4). This could be in creating physical and virtual collaboration zones that allow for people to connect and share ideas and learn together. In addition, many discussed organizing meeting times to allow for more knowledge-sharing and collaboration to spur creativity and employee engagement across the organization.

Those managers who were members of the baby boomer generation were more aware of the need to ensure there were plans for the future around knowledge management and passing information to the next managers. Succession planning is not a process traditionally performed in higher education organizations (Barton, 2019; Lapovsky, 2006). Interestingly, only one baby boomer mentioned succession planning during the interview. However, millennials referenced its importance in their team as they prepare for the next steps in their career and the careers of their managers and staff. Presumably, this is due to the number of Generation Z members these millennial managers are working with as members of their team.

The perception of the managers' readiness for baby boomer retirement varied across the participants. While the baby boomer participants felt more needed to be done to prepare for their retirement, most millennials felt prepared. The millennial managers did not have a baby boomer in direct succession in their management hierarchy, which

was the cause of their security around their perception of readiness. Baby boomers felt more was needed to prepare their teams, but only one discussed detailed strategies to share knowledge with peers in other generations.

Findings and the Conceptual Framework

The conceptual framework of this study was based on Bridges's model on transition, which explains how people and organizations work through changes. This model speaks to the psychological processing that comes from change; there are three phases that people go through to internalize and come to terms with the change. The three phases of the model are (a) ending, (b) neutral zone, and (c) the new beginning. The study's overall findings supported that transition occurs when baby boomers retire, and knowledge management plays a significant role in the transition process.

Managers can help people work through the phases as identified by the findings. During the ending phase, when an employee announces retirement, knowledge management and knowledge sharing strategies should be implemented if not already deployed. All participants acknowledged management practices for their explicit knowledge and the importance of sharing knowledge. In the neutral zone phase, when employees contemplate what this means, they are weighing their needs and evaluating their relationships and training needs. Most of the participants, 95%, mentioned providing training to their employees. The neutral zone phase is when cross-training would be crucial to prepare employees who are gaining new responsibilities; only 50% of the participants indicated they have currently cross-trained employees. During the new beginning, the employee has retired, and responsibilities have transitioned. The

remaining employee is working on new responsibilities and making them their own. Participants discussed the importance of having confident employees and prepared employees. While only one participant mentioned having a succession plan, millennial participants referenced its importance and career planning for managers. Assisting people through these phases and ensuring they are knowledgeable and prepared will support knowledge retention and business continuity efforts.

Limitations of the Study

Before starting the study, I identified two possible limitations to the study. An expected limitation to the study was regarding documentation from participants. I was unsure if all participants would be able to provide documentation to support their statements. Participants did not have any challenges providing documentation and participated in member checking without issue. The documents submitted captured explicit knowledge that aligned with the information shared by participants during the interviews.

The second limitation referenced my completing the study at the organization where I am employed and had familiarity with the participants. Following the interview protocol consistently and using a journal during the data collection process helped limit researcher bias. Some participants were invited but did not participate, and no undue pressure or repercussions occurred based on their decision.

Once I started the study, another limitation was that the interviews were held via telephonic conference calls instead of face-to-face interactions. Initially, I considered face-to-face interviews but transitioned to telephone interviews due to the COVID-19

global pandemic. The interviews were recorded, and journal notes were captured, but I could not see the participant's body language as they responded to the questions. This could mean that I missed potentially important nonverbal cues during the interview.

Finally, this study was completed using one site, so I have only the perspective of managers from one higher education institution. While that was an important perspective, it was not a complete perspective, and is a limitation to the generalizability of the study. Each organization operates differently, and although there are similarities, there are also differences that make each organization a unique ecosystem.

Recommendations

Recommendations for future research are outlined for each finding and additional recommendations that reference alternative study designs are included.

Finding 1: Knowledge Management Practices

Recommendations for future research include a study focused on knowledge management practices without the generational context in higher education organizations. This study's focus was on preparing for baby boomer retirement, but transitions occur regardless of the generation. When there was a generational shift occurring, the generational membership of the replacement was not as important in diagnosing their preparedness as the knowledge management strategies. It was clear from the study that it is important to think about the retirement of individuals, but people of all ages resign, transfer, and earn promotions. Using the conceptual framework to establish a process to encourage and support the transition period when an employee announces their departure could support business continuity processes across the organization. A study that removes

the generational membership and focuses on the knowledge management practices across a higher education organization will add to knowledge management practices.

Although the previous recommendation suggests a research study in higher education without the generational context, a study that looks at knowledge transfer across all generations in the workforce could identify new strategies for organizations. A study that explores new technologies, experiences of generational members, and learning differences could help higher education institutions continue to adapt to the needs of the communities they serve. Not only could the institution use these strategies internally, but they could also develop a curriculum to be shared with their students and partners.

To expand the literature and support future organizational advancements, a study should research the role of technology in knowledge management in higher education through machine learning. Budgets across higher education institutions continue to be reduced, and organizations need to stretch their limited resources. Knowledge management is key to an organization's future, but identifying whether knowledge has to be managed solely by humans could provide organizations alternatives to university administration and engagement with their constituents. In addition, other industries use machine learning to support their organization; this could be an avenue for higher education organizations.

There are several studies focused on institutional knowledge management strategies across most industries. I could only locate Barton's (2019) published study that focused on knowledge management strategies at a private institution. However, I could not locate any studies focused on knowledge management within the management of

higher education institutions. The study found that a more systematic approach to knowledge management across the organization would have been beneficial and supported by the workforce. A study focused specifically on the knowledge management strategies of universities would be beneficial to establish best practices across the industry.

Finding 2: Employee Development

In the literature review, I discussed the importance of talent management for organizations. Talent management was not a focus of the study, but it does play a role in the preparedness of future managers for an organization. Starting at the hiring process, recruiting people who have the same beliefs, values, and support the organization's mission is a start in building the bench strength. The bench is the employees that keep the organization running. Doing so can help the organization in its business continuity efforts and innovate in this ever-changing world. In addition, having a bench is vital to succession planning, and there is an opportunity for a study around developing future managers in higher education institutions.

There are several studies around the professional development needs for the baby boomer, Generation X, and millennials, but now that Generation Z is also in the workforce, generational studies need to expand to include this generation. There is little research about this generation as they are just entering the workforce. However, much can be learned regarding their work preferences, learning, and development needs. Additionally, the study could focus on technological advancements and how Gen Z

interacts with technology as career paths evolve and branch from traditional paths because of technology.

Finding 3: Future Planning

I was unable to locate any studies investigating succession planning across management levels in higher education institutions. The studies found focused primarily on presidential or senior management succession. As part of the study, it was evident succession planning could be beneficial for management roles outside of senior management to support business continuity throughout the various changes in the organization. Some of the participating managers acknowledged some succession planning efforts previously completed in their area. In contrast, others did not mention it or indicated no succession planning was completed for their teams. This is a common practice across other industries, but higher education does not consistently use this practice to develop the bench strength of their future leaders.

An additional recommendation is for a study on business continuity strategies in higher education. As aforementioned, this is a precarious time for higher education institutions; the rising cost of education, lower student enrollments, and challenges to the value of higher education have created an environment where more institutions are closing. This study could help other organizations develop strategies to secure their future. Additionally, a study on understanding the missteps of closed institutions could help an organization prepare for the future.

Additional Recommendations

This was a single case study to explore knowledge management strategies in preparation for baby boomer retirement and business continuity in an online higher education institution. A recommendation for a future study is to conduct a multiple case study across higher education institutions. Looking at multiple institutions and their knowledge management strategies could help them, and others, prepare for the future. Technological advances will continue to change the landscape of how learning opportunities are created, delivered, and managed. The outcomes of that study could further support the findings of this study and promote generalizability.

A noted limitation was the study was conducted using telephone interviews due to COVID-19 global pandemic protocols, which meant physical and nonverbal cues could have been missed. These cues are essential to qualitative studies and are used to enhance and analyze the participants' complete responses during the interview process. Repeating the study once the pandemic is over, using an alternative collection method, may provide additional results or even differing results to expand theory and practice.

Recommendations can be found in the logic models in Appendix D and Appendix E.

Implications

The analysis of the results of this study support literature found on the topic of knowledge sharing and answer the overarching research questions. Study results also addressed the general and specific management problems around knowledge sharing practices between baby boomer managers and their millennial replacements to support

business continuity in the organization. This section includes addressing the implications for social change for individuals, organizations, and communities.

Positive Social Change

Individual

The potential positive social change for the individual is the satisfaction of helping another person develop new skills, career development, and prepare for their growth. The opportunity to share knowledge supports the organization and the individual growth. When people share what they know with others, they also make themselves available to learn new knowledge. New knowledge allows for continued learning but also new steps in their career path. The positive social change they may experience in sharing knowledge is the continuation of the organization they have dedicated so many years of service for the retiring individuals. The findings in this current study demonstrate many teams have their own level of knowledge management practices in place and would be open to a more coordinated approach across the organization. Additionally, there are learning and relationship building opportunities experienced in sharing knowledge.

Organizational

Higher education is an asset to society, and for years it has been seen as an opportunity only for a few. Still, over time, the opportunity to continue learning has expanded to more people. The expansion of learning opportunities is only possible by having diverse higher education institutions that serve diverse populations. In a critical time where more higher education institutions are closing, organizations must have strategic plans and institutional priorities for managing their knowledge (Hillman &

Wernert, 2017). Knowledge management is key to business continuity planning and the organization's strategies for the communities they serve. This study identified areas the organization can focus on to secure their future strategies in managing knowledge.

Managers across the organization shared a need for an organizational focus on knowledge management to allow for consistency and a cultural shift that recognizes the importance for all who are a part of the organization. Additionally, this organization provides learning opportunities for underserved populations, and if this organization did not survive, many people would miss the opportunity to learn.

Community

Higher education organizations are an asset to the communities they serve and the larger society. All higher education organizations have a specific student demographic they support and academic disciplines it provides to their community. In Chapter 2, I discussed how knowledge management is taught in higher education business and technology schools; however, knowledge management is not consistently implemented in the institution's administration. As knowledge management supports business continuity, it is imperative higher education organizations incorporate knowledge management strategies to ensure their continued existence through improved decision making, capabilities, and cost improvement measures (Lehman, 2017). Beyond finances, knowledge is one of the top three assets of an organization (Martensson, 2000). Since 2015, an average of 10.6 colleges and universities close their doors (Muehlenbeck & Pineda, 2019); now, communities they served have fewer opportunities to pursue their educational goals. The reasons for the closures of these institutions vary, but institutional

strategies that support knowledge management and business continuity can help shield organizations from closure.

Implications on Theory

The conceptual framework of this study was based on Bridges's (2009) model on transition that proposes three phases of transition that help people manage and deal with change. Knowledge management during a period of change is critical to the success of the change. The components that constitute knowledge management, creation, sharing, retention are critical components to an organization being able to operate. Transitions occur frequently and rapidly as we live in a world of flux and where change is constant. Incorporating Bridges's model on transition allows organizations to prepare for and support their organizational members. The role of knowledge management during a transition period is critical to the success of the organization and its members. The emotions members work through during the transition period can be helpful or detrimental to their individual development and organization. Organizations that take time to plan for transitions in their knowledge management and business continuity strategies will be better prepared to manage future changes.

Implications on Practice

Incorporating the transition model into practice in the organization could support the organization's knowledge retention strategies and business continuity. An employee leaving the organization voluntarily or involuntarily can leave gaps in an organization. If an employee voluntarily leaves an organization, they most often provide an organization 2 weeks' notice; using this time to the organization's and incoming replacement's

advantage will aid in maintaining at least the minimum standard. Implementing transition meetings at a minimum with identified replacement and management supports a mature organization focused on employee development and organization continuity.

Management succession planning across the organization will also support knowledge management strategies and continuity as employees either leave the institution or move into other roles. It has been stated succession planning is not a practice most higher education institutions use to plan for their future managers. However, identifying key personnel for manager roles supports knowledge management practices that promote sharing knowledge throughout the employee's tenure.

Recommendations for Organization

Several participants mentioned using formal and informal mentor relationships throughout the study as part of their training and development programs for their teams. Although most were informal, there was much discussion of the need for a formalized mentor program for managers and prospective managers across the organization. In addition, the literature supports organizations preparing for their future by investing in talent in their organization.

Additionally, provide a culture of collaboration where all views matter and there is an opportunity for people to share information, brainstorm, and listen. Knowledge sharing is critical to an organization's culture. During the data collection process, managers shared various ways to share knowledge, and most indicated collaboration was an essential part of their knowledge management strategies.

There are studies around establishing knowledge management practices and policies at the organizational level. The institution studied did not have identified policies or practices at the organizational level. However, the sentiment was shared by several participants during the interview process. Additionally, establishing a repository that could be used by all teams that supports the institutional policies would also be beneficial. An accessible repository to all constituents who have a need can help make knowledge management and knowledge sharing a part of the institution's culture.

Finally, the organization should take time to purposefully plan for the future by focusing on developing their current management team and providing opportunities for future leaders. Creating development opportunities for current managers will also support the organization's knowledge management and business continuity strategies. For example, participants focused on the knowledge management practices in their teams during the data collection process, but many admitted there was a gap for their managers. This gap should be formally addressed and prioritized for consistency and to support the business continuity efforts of the organization.

Conclusions

Baby Boomers are quickly approaching or are at retirement age and will take the institutional knowledge they have with them into retirement. While in the education industry, specifically higher education, people are slow to retire, it is happening, and organizations need to be prepared to ensure business continuity during the transition. Robinson (2017) explained, "there are very few studies that concentrated on generational

differences in the higher education workplace” (p.71). This study provided a look at the organizational preparation of generational members within the administration.

Additionally, this study offered insights into the importance of knowledge management practices that promote knowledge sharing across members of the organization to support business continuity. Lehman (2017) stated, “knowledge is the most valuable resource in any organization” (p. 53). The common perspective shared by participants was that knowledge management practices were critical to the organization, and there should be a strategic institutional focus. Implementing consistent strategies may aid the organization during all transitions, retirements, resignations, transfers, and promotions.

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Appendix A: Interview Protocol

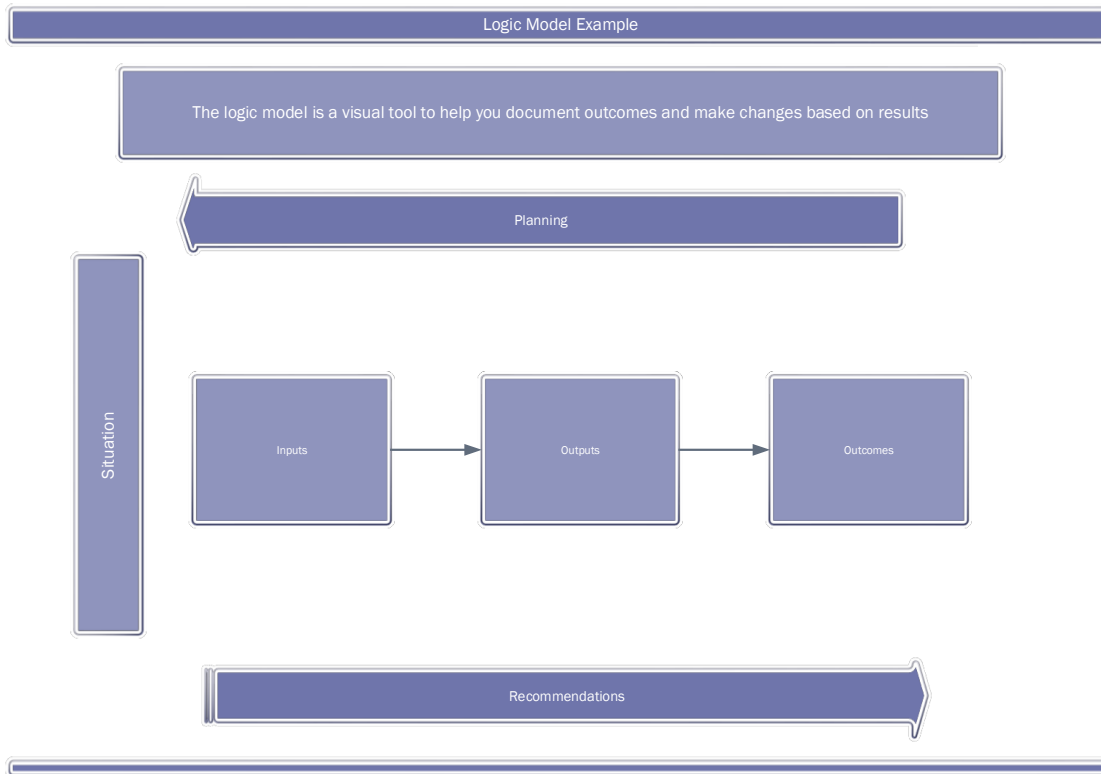
An interview protocol is a procedure a researcher follows to establish the guidelines and interview procedure to ensure that the interview experience can be replicated by other researchers (Janesick, 2011).

1. Contact participants who responded to the invitation to participate and establish a meeting date, time, and place for the interview via teleconference.
2. Introduce self to the participant.
3. Discuss the study, review informed consent, collect the participants' signed form if it wasn't already submitted, answer the participants' concerns and questions.
4. Turn on the audio recording device.
5. Begin the interview by following questions in order through the final question.
6. Follow up with any additional questions.
7. End the question sequence, discuss member-checking with the participant, and share the timeline for transcript review and response.
8. Turn off the audio recording device.
9. Thank the participant for their participation and verify contact information for follow-up and transcript verification.
10. End interview session.
11. Transcribe the interview within 48-hours of the interview and send it to the participant for review with a date for response.
12. Code the verified transcript within 48-hours of receipt from the participant.

Appendix B: Interview Questions

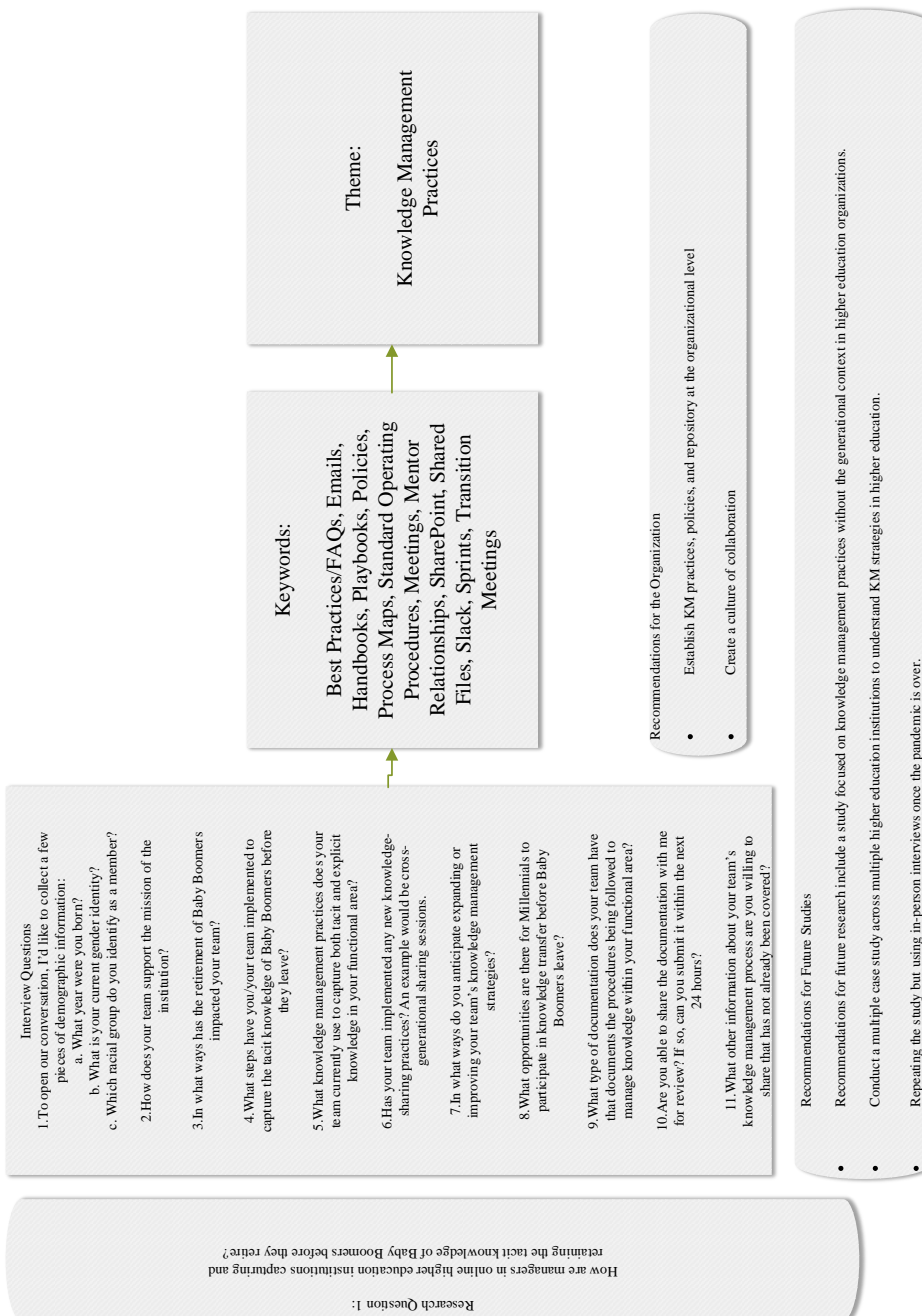
1. To open our conversation, I'd like to collect a few pieces of demographic information:
 - a. What year were you born?
 - b. What is your current gender identity?
 - c. Which racial group do you identify as a member?
2. How does your team support the mission of the institution?
3. In what ways has the retirement of Baby Boomers impacted your team?
4. What steps have you/your team implemented to capture the tacit knowledge of Baby Boomers before they leave?
5. . What knowledge management practices does your team currently use to capture both tacit and explicit knowledge in your functional area?
6. Has your team implemented any new knowledge sharing practices? An example would be cross-generational sharing sessions.
7. In what ways do you anticipate expanding or improving your team's knowledge management strategies?
8. What opportunities are there for millennials to participate in knowledge transfer before Baby Boomers leave?
9. What type of documentation does your team have that documents the procedures being followed to manage knowledge within your functional area?
10. Are you able to share the documentation with me for review? If so, can you submit it within the next 24 hours?
11. What other information about your team's knowledge management process are you willing to share that has not already been covered?

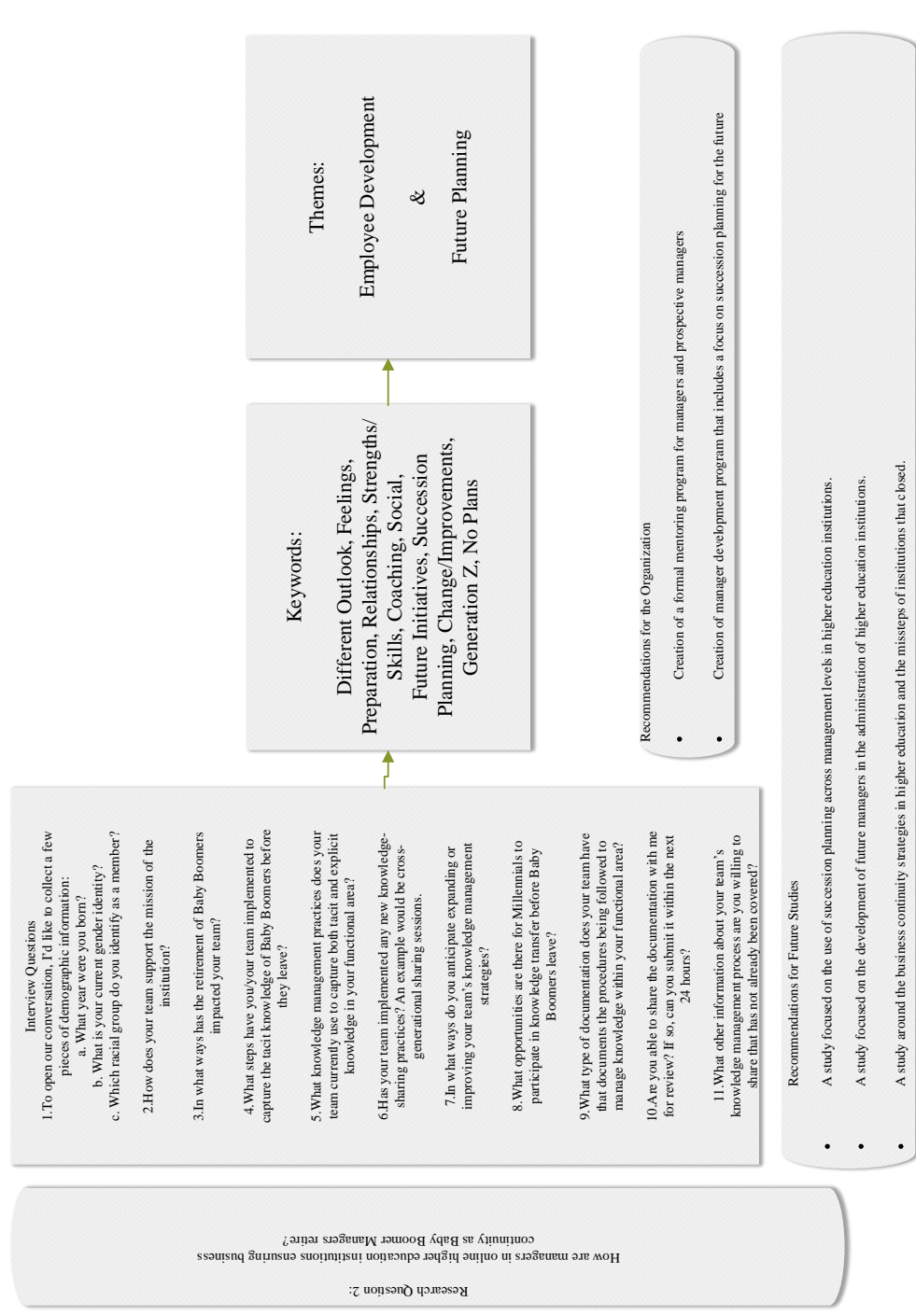
Appendix C: Logic Model Example



Appendix D: Logic Model Research Question 1

Logic Model Research Question 1





Appendix E: Logic Model Research Question 2