2015

Strategies to Retain Tacit Knowledge From Baby Boomers

Rhonda Jean Corwin
Walden University

Walden University

College of Management and Technology

This is to certify that the doctoral study by

Rhonda Corwin

has been found to be complete and satisfactory in all respects,
and that any and all revisions required by
the review committee have been made.

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

Dr. Arnold Witchel, Committee Member, Doctor of Business Administration Faculty

Dr. Judith Blando, University Reviewer, Doctor of Business Administration Faculty

Chief Academic Officer
Eric Riedel, Ph.D.

Walden University
201

Abstract

Strategies to Retain Tacit Knowledge from Baby Boomers

by

Rhonda Corwin

MBA, MidAmerica Nazarene University, 2002

BA, MidAmerica Nazarene University, 1999

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

January 2015

Abstract

Baby boomer employees who leave the workplace without sharing tacit knowledge create a knowledge gap within the organization. The purpose of this qualitative case study was to explore strategies local government leaders use to retain tacit knowledge of baby boomer employees. Six government leaders who worked in the Midwest United States participated in the study and shared their experiences and perceptions. Building upon systems theory, transformational leadership theory, and knowledge management theory, research was conducted to identify strategies to retain tacit knowledge from retiring baby boomers. The central research question was: What strategies do local government leaders need to retain tacit knowledge from retiring baby boomers? Data along with secondary information were collected through participant interviews, gathered from the study site, and analyzed using traditional text analysis. Three themes emerged: (a) mentoring, (b) generational differences, and (c) lack of structured systems. Mentoring was the most critical strategy leaders used to retain tacit knowledge from baby boomer employees. Acquiring collaborative leaders who foster a knowledge-sharing environment and encourage communication between multigenerational teams remained imperative to retain tacit knowledge. Implications for positive social change include taking advantage of the human capital and resources the baby boomer population characterized, and educating other government leaders to improve performance within government agencies. Other social change implications include the potential to train older workers to share tacit knowledge with new workers, and incorporate strategies to mentor new workers replacing the older workforce.

Strategies to Retain Tacit Knowledge from Baby Boomers

by

Rhonda Corwin

MBA, MidAmerica Nazarene University, 2002

BA, MidAmerica Nazarene University, 1999

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

January 2015

Dedication

I dedicate this doctoral study to my husband, Michael Lee Corwin. I want to thank you for your love, sacrifice, and repeated random acts of kindness. His continued support and encouragement have helped me thrive in my personal and professional life.

Acknowledgments

I would like to thank my parents, the late Clayton and Maxine Gilmore, for sacrifices made for me to enjoy the privilege of pursuing an education. I thank my committee members, Dr. Carol-Anne Faint, Dr. Yvette Ghormley, Dr. Judy Blando, Dr. Gene Fusch, Dr. Al Endres, Dr. Arnold Witchel, and Dr. James Savard. I would like to thank Dr. Freda Turner for her support throughout my doctoral journey. Lastly, I thank Dr. Michael Millstone for his friendship, encouraging words, and inspiration.

Table of Contents

List of Tables

Section 1: Foundation of the Study

Leaders struggle with how to harness and transfer the human capital of baby boomers to less-experienced generations (Pollack, 2012). Baby boomers exiting the workforce possess critical aspects of human capital lacking in inexperienced generations. Critical aspects of human capital, characterized by the experienced baby boomer population, include the tacit knowledge and specific skills newer workers need to assure the continuing efficiency of organizational operations (Joy & Haynes, 2011).

Background of the Problem

The global workforce is aging and leaders face challenges to recruit the right people with appropriate skills (Shacklock & Brunetto, 2011). Organizational leaders need an understanding of how to increase knowledge-sharing (Hau, Kim, Heeseok, & Kim, 2013). The baby boomers are generally defined as 77 million people born between 1946 and 1965, and are the largest generation in American history prepared to leave the workforce for retirement (Stevens, 2010). Leaders must ensure the smooth transfer of knowledge to maintain continuity for providing services and products (Aaron & Watson, 2010). In addition, leaders who retained tacit knowledge from baby boomers and trained younger employees to assume future leadership roles captured and preserved valuable insight and experience.

Problem Statement

An estimated 20% of the 150.9 million jobs in the United States require replenishing because of baby boomers exiting the workforce (U. S. Bureau of Labor Statistics, 2012). Baby boomers represent 28% of the working population in the United

States and employers lose tacit knowledge as employees retire (Gorman, 2010). Approximately 11,000 baby boomers turn 50 every day and will vacate 152 million positions by 2030 (Meriac, Woehr, & Banister, 2010). The general business problem is baby boomers are exiting the workforce and not sharing tacit knowledge. The specific business problem is local government leaders may lack strategies to retain and transfer tacit knowledge from baby boomer employees to the replacements.

Purpose Statement

The purpose of this qualitative case study was to explore what strategies local government leaders use to retain tacit knowledge of baby boomer employees. I conducted face-to-face, semistructured interviews, and studied documentation and physical artifacts, within one government agency in the Midwest United States. Leaders provide significant contributions to the daily operations of government and need strategies to sustain consistent performance throughout the organization when baby boomers retire (Pollack, 2012). The results of this study could assist leaders to identify strategies to retain tacit knowledge because of a loss in human capital as baby boomers retire from the workforce. Understanding the value of human capital and the resulting loss of tacit knowledge may encourage leaders to retain and transfer tacit knowledge. Baby boomers represent 28% of the working population in the United States and possess experience, knowledge, skills, and networks (Gorman, 2010). The results of this study could inform policy, by introducing successful strategies for retaining tacit knowledge, and raise awareness on loss of work experience. Positive social change may result from taking advantage of the human capital and resources the baby boomer population characterized, and educating other government leaders to improve performance within government agencies. The findings may benefit retiring workers and the new workers' families by: (a) the development of flexible work schedules for employees, (b) training older workers to share tacit knowledge with new workers, and (c) incorporating strategies to mentor new workers replacing the older workforce.

Nature of the Study

I conducted a qualitative single-site, case study to explore strategies needed by local government leaders to retain and transfer tacit knowledge from baby boomers to their replacements. I studied how leaders strategized to retain tacit knowledge embedded in the human capital of aging baby boomers before they retired. I identified common themes among participant experiences and perceptions.

I considered three methods to conduct the study: qualitative, mixed methods, and qualitative approaches. Quantitative research is a method to investigate relationships, cause-effect phenomenon, and conditions (Bloomberg & Volpe, 2012). Quantitative analysis is descriptive, exploratory, quasi-experimental, and experimental (Fiegen, 2010). A quantitative approach involved gathering, testing, and analyzing empirical data expressed in numeric terms (Williams, 2007). I did not choose a quantitative approach for this study because the quantitative method would require gathering data in a numerical format and would not reveal experiences and perceptions of participants.

Mixed methods practitioners seek to converge, corroborate, enhance, illustrate, and elaborate results from one research method with the findings from another research method (Muskat, Blackman, & Muskat, 2012). Researchers apply a mixed methods approach to combine the qualitative and quantitative approaches. I could have chosen a mixed methods approach if I had wanted to encompass both quantitative and qualitative inquiry. However, because I wanted to learn from shared perspectives, and not quantitative inquiry, I did not conduct a mixed methods approach.

In contrast, qualitative research provides a deeper understanding of a social setting from the participants' point of view, relying on the description, exploration, and discovery (Bloomberg & Volpe, 2012). Qualitative methods provide personal leader perspectives and detailed responses. A qualitative method was most appropriate for the study to facilitate a deeper understanding of perspectives to retain tacit knowledge from retiring baby boomers (Bloomberg & Volpe, 2012).

The research designs considered for the study included grounded theory, narrative, ethnography, phenomenology, and case study. Case study researchers rely on multiple sources of evidence such as: (a) documents, (b) physical artifacts, (c) archival records, (d) audiovisual materials, (e) interviews, and (f) direct observations to triangulate findings and validate conclusions (Yin, 2014). A qualitative case study was suitable for this study because I was investigating leaders' perceptions and experiences.

A researcher using grounded theory seeks to establish a new theory about a phenomenon (Bloomberg & Volpe, 2012). Practitioners use grounded theory to explain a social practice (Bloomberg & Volpe, 2012). The grounded theory approach was not appropriate for this study because I did not intend to develop a new theory.

Narrative researchers provide overviews of a person or group through the eyes of the researcher (Jorgensen, Dahl, Pedersen, & Lomborg, 2012). In narrative designs, participants retell personal stories to enhance a deeper understanding of life experiences. The narrative design was not suitable for this study as I was to study situations without a historic perspective.

An ethnographic researcher acts as a participant observer and focuses about how culture works through group observations (Shover, 2012). An ethnographer researches the traditional practices unique to the population (Shover, 2012). An ethnography design was unsuitable for this study because I did not study a phenomenon to understand cultural influence or behaviors of a unique or separate population.

Researchers use a phenomenological design to investigate the lived experiences of the participants and gain a deeper understanding of the business problem (Reiter, Stewart, & Bruce, 2011). A phenomenological study provided an interactive process to understand the actualities of a conscious experience (Moustakas, 1994). Phenomenological research is a strategy of inquiry used to assess the essence of lived experiences of individuals regarding a phenomenon as described by participants (Moustakas, 1994). I did not choose the phenomenological design because I was not seeking information on lived experiences. In contrast, I was seeking perspectives, and other data, including documentation and physical artifacts, about how to assure the retention of tacit knowledge from retiring baby boomers. A qualitative case study was suitable for this study because I was investigating leaders' perceptions and experiences. I interviewed a small sample and reviewed documentation and artifacts reflecting succession-planning initiatives.

Research Question

The following central research question guided the study: What strategies do local government leaders need to retain tacit knowledge from retiring baby boomers? I conducted face-to-face, semistructured interviews, asking open-ended questions, to capture participant perspectives.

Interview Questions

1. What is your perception of how the exodus of baby boomers may affect your organization?
2. What is your perspective of the strategies your organization uses to capture tacit knowledge from baby boomers?
3. What is your experience retaining tacit knowledge from a person reporting to you?
4. What obstacles, if any, obstruct your attempts to retain tacit knowledge of baby boomers?
5. How, if at all, are you addressing these obstacles?
6. What tacit knowledge transfer strategies will you share with colleagues before you retire?
7. What tacit information within the workplace holds value?
8. How do you determine what tacit knowledge holds a specific value?
9. What methods, if any, do leaders use to store and retain tacit knowledge retrieved from exiting baby boomers?
10. How do personnel share tacit knowledge in your organization?

11. What additional information can you provide to help me understand how your organization gathers and retains tacit knowledge?

Conceptual Framework

To construct the conceptual framework for this research study, I used: (a) systems theory, (b) transformational leadership theory, and (c) knowledge management theory. In 1950, von Bertalanffy posited the whole was more than the sum of the parts (von Bertalanffy, 1950). A system is a network of interacting elements and interacts with the environment (von Bertalanffy, 1950). For example, organizational leaders collaborate with various stakeholders including managers, customers, and shareholders. Leaders contribute to organizational performance and growth operating as an interconnected system. von Bertalanffy stated that systems theory applies systems principles to aid a decision maker with problems of: (a) identifying, (b) reconstructing, (c) optimizing, and (d) controlling a system. Proponents of systems theory intended to specify possible courses of action, together with the risks, costs, and benefits (von Bertalanffy, 1950). Managers paying attention to only certain bits of information, and ignoring others, may have contributed to negative sytemic consequences if the information remained vital to the user (Luhmann, 1995).

Leadership is the mastery of anticipating and implementing change (Bass & Bass, 2008). Transformational leaders exert influence by behaviors and actions serving as role models, to support the leader’s vision and mission (Koehler & Pankowski, 1997). Transformational leadership required the leader to influence others to accept responsibility for making decisions to improve organizational processes (Koehler &

Pankowski, 1997). Transformational leaders create value and positive change in followers with the end goal of developing followers into leaders (Burns, 1978). Manu (2010) considered leadership styles in various sized organizations and determined how administrators used transformational leaders within best-in-class companies. Exploring leadership styles remained vital in crisis-response organizations, and federal, state, and local municipalities (Kochanowski, 2011). Leaders who implemented succession-planning procedures advanced the continuation of the organization by identifying and developing prospective successors for critical leadership positions (McAlearney, 2010). Leaders used the process of identifying and organizing knowledge management systems to determine how organizational leaders used intelligence assets (Andreeva & Kianto, 2012). Organizational leaders faced challenges linking knowledge management theory to practice, and lacked understanding with respect to the association between knowledge management and strategy. Organizational knowledge is created through a continuous dialog between tacit and explicit knowledge (Nonaka, 1994). Leaders used knowledge management systems and tacit knowledge to contribute to the organizations' strategic performance (Venkitachalam & Busch, 2012).

Whereas distinctions in approaches to knowledge management strategy existed, leaders recognized the relationship between tacit knowledge and explicit knowledge. Smith (2001) suggested comparing tacit and explicit types of knowledge as a method to think, rather than highlight differences. Explicit knowledge specified the process dealing with how to organize knowledge, whereas tacit knowledge implied the practice referring to how individuals engaged in work-related tasks. Polanyi (1967) concluded comprehension exceeds what individuals perceive through somatic knowledge, and individuals communicate tacit knowledge through demonstration rather than written words (Polanyi, 1967).

Systems theory, transformational leadership theory, and knowledge management theory provided a foundation for the study. This study was designed to investigate the retention of tacit knowledge of local government workers. Leaders recognized and addressed the need to identify, and develop, high performance transformational leaders to assume primary leadership roles (Haskins & Shaffer, 2010).

Operational Definitions

Affective tacit knowledge: Affective tacit knowledge is tacit knowledge connected to emotions, and feelings, with emotions representing an expression of feelings (Woods & Woods, 2010).

Baby boomer: A baby boomer is a person born during the post World War II baby boom between 1946 and 1965 (Stevens, 2010).

Charismatic leaders: Charismatic leaders are skilled, verbally eloquent communicators, able to communicate to followers on a deep emotional level. Charismatic leaders arouse strong emotion in followers (Wilderon, van den Berg, & Wiersma, 2012).

Embodied tacit knowledge: Embodied tacit knowledge, referred to as *somatic knowledge*, creates neuronal patterns stored in the body (Woods & Woods, 2010).

Explicit knowledge: Explicit knowledge is the knowledge found in books, on the Internet, and other visual or oral means (Woods & Woods, 2010).

Generation X: Generation X is the generation following the baby boomers born between 1965 and 1979 (Salahuddin, 2011).

Generation Y: Generation Y refers to the demographic cohort born between 1975 and 1995 (Salahuddin, 2011).

Generational team: A generational team is a work group of Generation X, Generation Y, or baby boomers, wherein each generation possesses different attitudes, values and mindsets (Gesell, 2010).

Human capital: Human capital is a collection of skills, knowledge, and experience possessed by an individual, viewed by value, or a cost to the organization (Green & Roberts, 2012).

Intellectual capital: Intellectual capital is the collective knowledge of individuals in an organization or society (Perlman, 2010).

Intuitive tacit knowledge: Intuitive tacit knowledge is a sense of knowing from inside individuals influencing decisions and actions: yet decision-makers cannot explain how or why the action taken is correct (Woods & Woods, 2010).

Knowledge management systems: Knowledge management systems are processes of information creation, sharing, and preserving (von Krogh, 2012).

Micro-community of knowledge: A micro-community of knowledge is a group of individuals, getting to know each other's personalities, interests, and values, and the type of behavior that is, or is not, acceptable to the group (Anand, Ward, & Tatikonda, 2010).

Multifactor Leadership Questionnaire: The Multifactor Leadership Questionnaire shows leadership behaviors used by supervisors, and the level of an individuals' satisfaction with organizational communication (Alsayed, Motaghi, & Osman, 2012).

Neuronal patterns: A neuronal pattern is the encoding of memory stimuli in the brain optimizing computational capabilities, and informational transmission (Bennet & Bennet 2011).

Offshore outsourcing: Offshore outsourcing is a method of contracting with companies outside of the United States borders, to perform services (Haveman, Heinrich, & Smeeding, 2012).

Phased retirement: Phased retirement is a process to allow workers to make adjustment for age-related changes in energies or abilities, without sacrificing social networks, wages, and a sense of being useful (Appelbaum, Gunkel, Benyo, Ramadan, Sakkal, & Wolff, 2012).

Program manager: A program manager works with the organization to establish standards, and administers the development of tools and systems to manage projects (Pollack, 2012).

Protégés: Protégés are individuals who receive encouragement and protection from an influential person interested in furthering the individual's career (Huskins, Silet, Weber-Main, Begg, Fowler, Hamilton, & Fleming, 2011).

Skill gap: A skill gap is a significant gap, between an organization's current capability, and the skills needed to achieve its goals (Marottoli & Coughlin 2011).

Social entrepreneur: A social entrepreneur is an individual with a unique set of skills, determination, and an unwavering passion for a social mission (Smith, Besharov, Wessels, & Chertok, 2012).

Spiritual tacit knowledge: Spiritual tacit knowledge focuses on moral aspects, the emotional part of human nature and higher development of mental faculties (Woods & Woods, 2010).

Succession planning: Succession planning is adopting proactive strategies to staff the organization with qualified individuals for the purpose of retaining knowledge (Aaron & Watson, 2010).

Systems theory: Systems theory is a principle to aid a decision-maker with problems of: (a) identifying, (b) reconstructing, (c) optimizing, and (d) controlling a system (von Bertalanffy, 1950).

Tacit knowledge: Tacit knowledge is knowledge one gains through observation and through asking questions (Holste & Fields, 2010).

Transformational: Transformational is a function of individual differences that includes discernible behaviors such as: (a) experience, (b) intelligence, and (c) conscientiousness (Cavazotte, Moreno, & Hickmann, 2012).

Transformational leadership: Transformational leadership is a method of leadership involving three specific behaviors: (a) inspirational motivation, (b) individualized consideration, and (c) intellectual stimulation (Gundersen, Hellesoy, & Raeder, 2012).

Wisdom: Wisdom is a method of advanced cognitive and emotional development that is experience focused (Anand et al., 2010).

Workforce planning: Workforce planning is a process leaders design to ensure organizations' leaders prepare for future needs by acquiring the right people with the right skills employed in the right places at the right time (Jacobson, 2010).

Assumptions, Limitations, and Delimitations

Assumptions

Three assumptions affected the study. First, participants could articulate experiences related to the researched phenomena. Second, participants could respond honestly to the interview questions. The third and final assumption was patterns and themes may emerge from participant responses the researcher could identify and categorize.

Limitations

The small sample size of six participants limited the generalizability of results (Yin, 2014). Interviews continued until reaching saturation. Research skills, and the availability of data during the research process limited the investigation depth and richness (Yin, 2014). The interview time span may have limited the amount of information collected or may have led to incomplete statements. Another limitation was that only governmental leaders were interviewed.

Delimitations

The population for the study included local government administrators in the Midwest United States. The sample from the population included six organizational leaders within local government agencies. The purposeful sample size was a delimitation as the perspectives reflected the experiences of those interviewed and were not generalizable to agencies or geographic locations (Yin, 2014).

Significance of the Study

Contribution to Business Practice

Leaders should not underestimate the significance of knowledge management strategies in organizations as baby boomers leave established roles within the workforce (Andrews & Boyne, 2010). The retirement of the baby boomer generation will lead to skill shortages in the United States (Neumark, Johnson, & Mejia, 2013). Leaders without a succession plan could realize a loss of tacit knowledge coupled with a shortage of competent leadership leading to failure of daily operations (Andrews & Boyne, 2010). Business leaders could benefit from the strategies identified in this study to retain tacit knowledge from baby boomers.

Implications for Social Change

Administrators should authorize the next generation of leaders to foster economic value, and create positive social change (Ganu & Boateng, 2012). Succession planning was a significant activity needed to ensure business continuity. Leaders could generate positive social change by exploring the principles and insights of hidden abilities to sustain the organization, raising awareness regarding the risks related to the large number of baby boomers exiting the workforce (Ganu & Boateng, 2012).

Leaders leaving organizations without a succession plan could jeopardize projects and disrupt business continuity (Ganu & Boateng, 2012). Fiscal advisors who delay succession planning jeopardize the viability of the organization (McDonnell, Lamare, Gunnigle, & Lavelle, 2010). In a 2010 Succession Planning Study from 260 multinational enterprises, McDonnell, Lamare, Gunnigle, and Lavelle (2010) stated that 92% of the advisors surveyed believe not possessing a succession plan created a business risk. However, 35% of the firms' leaders had no plans established. Leaders must strategize how to communicate tacit knowledge, and protect assets to ensure sustainability (McDonnell et al., 2010). Findings and recommendations from the study may assist local government leaders in strategizing methods to retain tacit knowledge of baby boomers. The findings may benefit the organization's employees, families, and communities by: (a) investing in programs to retain institutional knowledge, (b) recruiting the necessary talent and changing existing programs and policies to test the development of new approaches to manage the transition of an older workforce, and (c) becoming pioneers for the upcoming generations regarding workplace flexibility. The knowledge from baby boomers could continue to shape the workforce for generation Y and X. The legacy of the baby boomer cohort could be one of innovation in the workplace and transform expectations for future generations.

A Review of the Professional and Academic Literature

The purpose of this qualitative case study was to explore what strategies local government leaders needed to retain tacit knowledge of baby boomer employees. The following comprehensive review of the literature includes eight distinct aspects related to tacit knowledge, and includes: (a) capacity risks, (b) general dynamics, (c) organizational memory, (d) aspects of tacit knowledge, (e) succession strategies, (f) the consequences of no management action, (g) affect of successfully implemented strategies, and (h) qualitative approaches to retain knowledge. I used systems theory, transformational leadership, and knowledge management as a framework to investigate common themes among research participants. I reviewed themes related to tacit knowledge, baby boomers, and succession planning. In the literature review I provided information about how understanding of knowledge management principles could assist in retaining tacit knowledge from baby boomers. The research question addressed the issue of leaders who lacked strategies to retain tacit knowledge in baby boomers.

I used 104 academic and government sources to augment the proposal. I ensured the quality of material by confirming 93%, of the sources were from peer-reviewed articles, published within 5 years of the anticipated graduation date. The review included peer-reviewed articles, dissertations, and a seminal business book (Yin, 2014), related to the business problem, located through: (a) Science Direct, (b) ABI/INFORMS Complete, (c) Business and Source Complete/Premier, and (d) Emerald Management Journals. Fundamental words included: (a) *affective tacit knowledge,* (b) *baby boomer,* (c) *embodied tacit knowledge,* (d) *explicit knowledge,* (e) *Generation X,* (f) *Generation Y,* (g) *generational team,* (h) *human capital,* (i) *intellectual capital,* (j) *intuitive tacit knowledge,* (k) *case study research,* (l) *skills gap,* (m) *social entrepreneur,* (n) *spiritual tacit knowledge,* (o) *succession planning,* (p) *tacit knowledge,* and (q) *workforce planning.* I include the following topics in the literature review: (a) theory, (b) capacity risks, (c) general dynamics, (d) operational memory, (e) aspects of tacit knowledge, (f) succession planning strategies, (g) consequences of no management action, (h) affect of successfully implemented strategies, and (i) qualitative approaches to retaining knowledge.

Business leaders face potential problems with an imminent mass retirement of baby boomers (Andrews & Boyne, 2010; Jacobson, 2010). Leaders provide significant contributions to the daily operations of government, and leaders could develop strategies for managing daily operational requirements and business continuity efforts with a substantial sum of the workforce aging and leaving. Leaders should consider how tacit knowledge sustains value to organizations, even though tenured employees retire, and are no longer available for knowledge sharing (Andrews & Boyne, 2010; Jacobson, 2010).

Theories

Three collective theories comprised the framework for this research study: systems theory, transformational leadership, and knowledge management. Systems theory originated in the natural sciences as a way to understand sets of objects, relationships between the objects, and the relationship between sets of objects and their environment (von Bertalanffy, 1950). The whole, characterized by a complex organization and integration of functions, determines the character and function of its parts (von Bertalanffy, 1950). Systems theory was a field of general principles applicable to systems in general. Another researcher, Kenneth Boulding, worked independently of von Bertalanffy and in different fields of economics and social sciences; however, arrived at similar conclusions (von Bertalanffy, 1950). Boulding's interest led to the formation of the Society for General Systems Research, an affiliate of the American Association for the Advancement of Science, the American Psychiatric Association, and many similar groups in the United States and Europe (von Bertalanffy, 1950). Systems theory was applied broadly in a manner similar to the theory of evolution, compromising everything from fossil digging to mathematical theory. Systems are models of nature and conceptually equivalent to universal traits of observed entities. Systems theory is a model of general aspects of reality and a way of seeing items previously overlooked (von Bertalanffy, 1950).

Critical systems thinking is a supporting theory of systems theory, introduced by Michel Foucault (von Bertalanffy, 1950). Researchers who apply critical systems thinking use constant critical reflection to problem solve. Critical systems thinking includes several areas of commitment including critical awareness, social awareness, and human emancipation. Researchers use critical awareness to analyze the expectations, strengths, and weaknesses of the systems methods. Human emancipation seeks to raise the quality of life and works for the people involved in a systems intervention. Systems design theory seeks to understand the situation as a system of interconnected, interdependent, and interacting problems. Systems design theory includes focusing on problem finding, studying the problem, and focuses on finding solutions and systems (von Bertalanffy, 1950).

The second theoretical framework for this study is transformational leadership. Avolio and Berson (2004) illustrated that transformational leadership is more practical and more applicable than transactional, corrective, or avoidant leadership in motivating followers. Transformational leaders are more capable of identifying their environment and creating strategic goals gaining the attention and interest of their followers (Avolio & Berson, 2004). Followers of transformational leaders display higher levels of commitment to their organizational mission, an eagerness to work harder, superior levels of trust in their leader, and high levels of cohesion (Avolio & Berson, 2004). Transformational leaders are successful by engaging subordinates in shared exchange processes based on interpersonal trust, common loyalty, and long-term reciprocity with supervisors (Tse, Huange, & Lam, 2013). Transformational leaders are able to encourage employees to stay with the organization by showing individualized attention and developing strong personal relationships with their employees. Finally, transformational leaders transcend employees' self-interest to organizational interest by introducing social exchange between the organization and employees to lessen turnover intention and behavior (Tse et al., 2013).

Avolio and Berson (2004) conducted a case study on transformational leadership in a large Israeli telecommunications organization. The participants rated managers for leadership and organizational outcomes. The Multifactor Leadership Questionnaire contained questions to measure leadership style. The data collection included semistructured interviews with 37 managers and 64 direct reports. Transformational leaders exhibited a personalized approach when communicating strategic goals. Findings from this study showed transformational leaders are likely to induce employees to stay at the organization because leaders are able to build high-quality personalized relationships with subordinates (Avolio & Berson, 2004). Further, transformational leaders inspire employees to transcend their individual interest, and make a high-level commitment to the organization. Subordinates are likely to stay with the organization and follow a transformational leader (Avolio & Berson, 2004). Followers are less likely to leave the organization because of the personalized relationship, and the leader's ability to inspire employees to perceive the organization's collective interest as their own (Avolio & Berson, 2004).

Capacity Risks

Baby boomers nearing retirement affect federal services. Baby boomers eligible to retire remain fundemental to the organization in a manner similar to high-quality new recruits. New employees and retirement eligible employees are two groups with the highest turnover rates (Cho & Lewis, 2012). Human resources officials could develop retention strategies to reduce recruiting investment, increase return on investment, and create a smooth transfer of knowledge to the next generation.

Managers consider aging workers as costly and inflexible, or unlikely to learn new skills (Streb & Gellert, 2011). Consequences causing concern of the ongoing baby boomer retirement crisis is the unprecedented loss of work experience (Erdogan, Bauer, Peiro, & Truxillo, 2011). Leaders should assess the affect an aging workforce has on the organization as well as the age distribution of the employee base. Managers determine how many workers should remain to fill required positions by determining the current workforce structure, along with how many workers leaders expect to retire (Erdogan et al., 2011).

Administrators encounter growing anxieties, and should prepare for retaining tacit knowledge as baby boomers begin to retire. Innovators contemplate methods to retain human capital that took years to cultivate within the minds of employees. Leaders who used succession planning obtained a return on human capital in maturing public managers in transition to retirement (Perlman, 2010). Executives confront common barriers preventing planning and succession planning, and experience preoccupation with short-term goals, insufficient staffing, financial restraints, and a lack of executive supports. Few leaders conduct workforce planning and succession planning or advanced training and development (Perlman, 2010). With few leaders taking on rigorous succession planning or developmental activities, superiors should decide what barriers prevent workforce planning (Jacobson, 2010).

Streb and Gellert (2011) posited organizational leaders must methodically deliberate about the demographic shift resulting in aging workers. Waiting until the crisis of mass retirement is upon the organization is too late to plan for the labor shortages. Labor shortages could be in a crisis stage within various industries, and qualified candidates could be in high demand. State and local governments face organizational failure without addressing the need to ensure tacit knowledge from baby boomers remains with organizations after employees retire. Superiors encounter barriers such as a lack of time and internal commitment, delaying leaders from workforce planning. With few leaders performing rigorous succession planning or developmental activities, leaders should collaborate to determine what obstacles prevent workforce planning (Jacobson, 2010).

Local and state government leaders should seek out creative and cost-effective measures to incorporate succession planning. Political leaders know little regarding human capital or the engagement efforts of securing what employees understand stays with the organization (Perlmam, 2010). Executives should develop incentive programs to encourage employees considering retirement to mentor other employees and identify successors to fill vacancies before leaving the organization. Public sector policy makers should address workforce planning, and assist local government organizations to formulate policies for effective succession planning (Perlman, 2010).

General Dynamics

Generation Y, also known as the Millennials, represents the largest population cohort in the United States (Doherty, 2013). The Millennial population is 7% larger than the baby boomer generation. The two generations preceding the Millennials, the baby boomers and Generation X, believed in a controlled management approach and valued working individually (Brack, 2012). Generation X needs to develop authentic leadership skills to support the development of social responsibility and achieve corporate sustainability (Lloyd-Walker & Walker, 2011). White (2011) found that all three generations expected the following from their employers: (a) to work on interesting projects, (b) competitive compensation, (c) opportunities for advancement, (d) to be treated fairly, and (e) work-life balance. Millennials, Generation X, and baby boomers agreed that the ultimate leader (a) leads by example, (b) is accessible, (c) helps others understand their contributions to the organization, (d) acts as a mentor, and (e) holds others accountable (White, 2011). The baby boomer generation is willing to work beyond retirement age only if the environment is conducive to current needs (Porcellato, Carmichael, Hulme, Ingham, & Prashar, 2010). Millennials and Generation X believe in separation of work and personal life (Gursoy, Chi, & Karadag, 2013).

Individuals inherit generational differences, linked through ideas, values, skills, culture, and knowledge (Joshi, Dencker, & Franz, 2011). Individuals belonging to a group with shared experiences indicated generations were a social creation, functional of historic experiences, and evolve as individuals became adults. Leaders predict a generational phenomenon to create a significant effect on recruitment, succession planning, skill transfer, and knowledge-sharing (Joshi et al., 2011). Team members' perception of older workers disclose prejudices regarding older team members and affect team performance. Team members see older workers as possessing deficiencies creating tension and lower job satisfaction. Leaders leveraging older workers' experiences create value for the team along with higher levels of performance (Streb & Gellert, 2011).

With a shortage of 30 million workers, front-runners of large organizations should assume knowledge management practices because of the wide range of expertise available. The leaders of small and medium-sized organizations characteristically have no formal knowledge management systems because of limited resources, creating additional challenges for leaders of smaller organizations (Supyuenyong & Swierczek, 2011). Leaders are aware of the accelerating demographic, technological, and societal trends, and the potential for creating risks for the organization. Employees use technology to communicate and use a method based on generational preferences (Gratton, 2011). Workers use mobile devices and the Internet to communicate, and authorities should determine how to acquire tacit knowledge for the changing demographic (Murphy & Johnson, 2011). Generations compete for resources and power. Gratton (2011) contended that there are differences between situations and the circumstances of generations; however, the stereotypes of generations were rarely accurate. Organizational leaders should protect investments made in older workers, and focus on what motivates employees regardless of age. Baby boomers use experience from generational teams to solve business problems (Gesell, 2010; Meriac et al., 2010). Leaders misjudge the value and cost of hiring and training older workers (Meriac et al., 2010). Baby boomers show interest in developing expertise in social media and new technology, and are excellent mentors. Mentors are typically 50 year of age or older possessing tacit knowledge that is difficult to replace. Leaders implementing cross-generational mentoring provide employment enrichment and improve organizational knowledge (Gratton, 2011).

Frederick Winslow Taylor (1856-1915) stated that work is a series of motions and only becomes productive with knowledge (Drucker, 1999). Knowledge workers accumulate skills over time and contribute to the knowledge base of the organization. The study of knowledge management is relatively undeveloped, and the literature is evolving to distinguish the method from other social sciences (Wallace, Fleet, & Downs 2011).

Organizational leaders trust employees to respond to reward systems when offered and respond to individual reward systems, rather than group reward systems. Administrators determined group-based reward systems have efficiency problems and are less effective than individual-based reward systems. Scientists reasoned most highly productive workers did not participate fully in the knowledge-sharing (Li & Jhang-Li, 2010).

Facilitating Knowledge Transfer

A review of the literature detailed only a few examples of programs to facilitate knowledge transfer. Pollack (2012) found managers in Australia identified issues with the aging workforce and the potential to affect performance. Program managers implemented a knowledge management program emphasizing the visibility, senior management encouragement, and leveraged participant interest, rather than an emphasis on the definition and control. In this qualitative study, data collection included semistructured interviews. The program was composed of more than 10,000 employees worldwide. Researchers administered a survey, and followed focus groups, to understand outlying responses. A manager commented in an interview that organizations must have product expertise in the next generation (Pollack, 2012).

The financial services sector changed the culture, implementing intergenerational knowledge transfer as a core operating principle. Pollack (2012) continued to say business leaders in the financial services sector develop knowledge management programs to create a culture of knowledge-sharing in response to the aging workforce. The results of the research illustrated how important the sponsorship role was when implementing a new knowledge management program. Additional results from the study indicated a lack of changes in business practices as detrimental to the organization (Pollack, 2012).

Researchers from The Canadian Nurses Association anticipate a nursing shortage of 60,000 registered nurses by 2022 (Clauson, Weir, Frost, McRae, & Straight, 2011). Another group of researchers in the nursing industry, conducted a pilot knowledge program on the aging workforce using mentoring to transfer knowledge (Clauson et al., 2011). Twenty-nine Canadian nurses, age 55 and older, with up to 40 years of experience, shared knowledge and expertise with the next generation of nurses. The qualitative research included interviews, surveys, and focus groups. Results contained recommendations about how the translation of knowledge by nurses improved practice-learning environments. Unexpected outcomes of the research involved reciprocal learning, and the practice of nursing peers through modeling and discussion (Clauson et al., 2011).

Implementing knowledge sharing processes may produce benefits throughout government and non-government entities (Connell, 2013). One method to support a knowledge sharing process involved portraying a culture of openness and enthusiasm to share on all levels, from upper administration to individual employees, as well as between individual workers. Employees desire more in-depth, formal, coordinated group training as well as more hands-on, one-on-one training. Delivering practical training prior to project implementation remained important, instead of reactive training, after the project start date. In addition to individual and group training, providing job aids, with current procedures and samples, to assist employees in daily activities enhance knowledge sharing (Connell, 2013).

One complication for implementing knowledge management practices within an organization is its culture (Connell, 2013). Organizational structures are diverse and decentralized making knowledge sharing more challenging, and the continuous state of change within the organization hinders knowledge sharing. External changes relating to policies and procedures also contribute to the constant state of change. Managers perform a critical role to make sure employees comprehend all aspects of the knowledge management processes to achieve the mission of the organization effectively. Managers should provide the time and training to facilitate the knowledge sharing process (Connell, 2013).

Three Generations at Work

Younger generational employees have a reduced work commitment (Park & Gursoy, 2012). Younger employees are less likely to allocate personal resources to work tasks as younger generations place higher value on work-life balance and personal life (Park & Gursoy, 2012). Employees demonstrate diverse behavior in the workplace and generational differences influence the behavior. Leaders should include the younger generation work preferences and work values into human resources policies to keep Millennials (Park & Gursoy, 2012).

Approximately 11,000 baby boomers turn 50 every day (Meriac et al., 2010). The work sector requires 43 million Generation X workers to fill the 152 million positions vacated by retiring baby boomers. Aging baby boomers are creating skill gaps and leaders need to prepare to ensure optimal efficiency. Leaders rehiring or retaining older workers create viable solutions for short and long term staffing challenges (Meriac et al., 2010). Organizational leaders take advantage of generational dynamics, and a healthy atmosphere for transferring knowledge by creating opportunities for younger workers to provide the latest scientific and technical expertise motivating older workers to translate past situations and experiences. Gratton (2011) identified five external forces affecting the work of generational teams: (a) the way leadership development and succession planning takes place, (b) the use of teams and matrix structures, (c) reshaping organizational values, (d) redesigning practices and processes, and (e) supporting the development of skills and competencies. Leaders should build collaborative links across generational boundaries to develop innovative business strategies (Gratton, 2011).

Experienced leaders face complicated steps in the conversion of tacit knowledge into explicit knowledge. Employees working in a temporary organization work in a culture of open knowledge transfer between projects (Linder & Wald, 2011). Leaders will not succeed collecting knowledge without identifying a relationship of collective memory, and the relationship between mentoring and knowledge transfer (Fleig-Palmer & Schoorman, 2011). Baby boomers represent 28% of the working population in the United States and organizations face skill gaps as 77 million baby boomers retire. Professionals and managers are retiring, taking experience, knowledge, skills, and networks with them. Leaders should develop a process capturing knowledge about which talent shortages severely affect to mitigate the potential, substantial loss of knowledge (Gorman, 2010).

Three generations are in the workforce including baby boomers, Generation X, and Millennials, also known as Generation Y. Baby boomers matured in abundant economies. Baby boomers consist of 44% of the United States of America workforce and have sacrificed and worked hard for success (Gursoy et al., 2013). Baby boomers experience anxiety working with younger generations and expect younger workers to have a similar work ethic. Baby boomers are results-driven and work within hierarchical relationships in the workplace. Generation X craves teamwork, education, feedback, and short-term rewards. Generation X possesses specialized skills, rejects the status quo, and values work-life balance (Gursoy et al., 2013). Millennials comprise 25% of the United States workforce. Millennials grew up with computers, text messaging, and multi-player games. Generation X and Millennials face challenges working 8AM to 5PM workweeks, and studies show both generations require guidance and advice (Gursoy et al., 2013).

Aging baby boomers want to do meaningful work, mentor others, learn new technical skills, and use the experience to produce purposeful work (Gratton, 2011). Most baby boomers remain loyal to organizations when offered flexible choices as retirement approaches (Gursoy et al., 2013). Managers should keep older workers and not wrongly assume investing in the training of older workers yields a poor return on investment (Gursoy et al., 2013). Administrators should specify explicit and tacit knowledge of each baby boomer, by communicating unwritten practices, developing internal strategies to identify knowledge gaps, and identifying who should reduce gaps with business solutions (Meriac et al., 2010). Gursoy et al. (2013) posited a combination of societal, demographic, and carbon forces have profound implications for how, why, when, and where individuals work in the future. Human resources managers face challenges in open innovation and intergenerational cohesion (Gursoy et al., 2013). Managers from every department should work across generational, national, and institutional boundaries requiring high levels of adaptability (Gratton, 2011).

Organizational Memory

Individuals consider knowledge as power and a core competency (Lin, Wu, & Lu, 2012). Leaders struggle with commanding employees to share knowledge. The challenges of the future require human resources personnel to address knowledge areas and skills for which most human resources functions are undeveloped (Gratton, 2011). Academic scholars found knowledge-sharing literature paid little attention to traditional governance mechanisms, and future researchers should focus on knowledge-sharing

(Foss, Husted, & Michailova, 2010).

People belonging to a group with equality among members participate in communal sharing of knowledge. Leaders following authority order are higher in rank, and request information with the expectation lower ranked employees will follow. Experts regard reciprocity as a value of knowledge-sharing, and create organizational memory (Lin et al., 2012). Older workers are more reliable and have lower absenteeism than younger workers have. The initiative to offer early retirement programs reinforced the belief leaders viewed older workers in negative terms and acted to downsize older workers (Porcellato et al., 2010).

Executives dismissed by the board of directors increased the likelihood of external succession. Leaders in organizations with poor profits, and powerless top executives, increased the likelihood of dismissal and outside succession (Hilger, Mankel, & Richter, 2013). Team members experience difficulty regaining previous patterns of work performance, and the turnover creates disruption in succession events (Ballinger, Lehman, & Schoorman, 2010).

Aspects of Tacit Knowledge

The four aspects of tacit knowledge encompass (a) embodied, (b) intuitive, (c) affective, and (d) spiritual (Bennet & Bennet, 2011). Leaders acquired embodied learning by mimicry and skills training. When learning through study was significant or repeated, learning became tacit knowledge. Neuronal patterns embedded within long-term memory become automatic when needed and dissipate from consciousness (Bennet & Bennet, 2011). Intuitive tacit knowledge is complex as individuals arrive at solutions without reasoning to make a decision. As organizations grow in complexity, leaders rely more on intuitive tacit knowledge. Leaders build intuitive tacit knowledge in the minds and hearts over time through experience and unconscious processing resulting in continual learning through experience (Yong, Byoungsoo, Heeseok, & Young-Gul, 2013). Polanyi (1967) defined tacit knowledge as non-verbal, expertise involving an increased variability in how knowledge-sharing occurs (Wilkesmann & Wilkesmann, 2011).

Leaders relate affective tacit knowledge to feelings and emotions (Anand et al., 2010). Feelings, as a form of knowledge, lead to effective actions influencing action by connections with consciousness. Individuals thinking about a recent incident such as an argument or favorite sports team losing expressed affective tacit knowledge transferred by neurotransmitters carrying messages of emotion (Anand et al., 2010). Yong et al. (2013) described tacit knowledge as spiritual tacit knowledge, a transcendent power representing a form of higher guidance with unknown origin. Human characteristics, which contributed to learning, consist of five areas: (a) shifting frames of reference, (b) animating for learning, (c) enriching relationships, (d) priming for learning, and (e) moving toward wisdom. Leaders using spiritual tacit knowledge first learn to listen to the conscious self (Yong et al., 2013).

Leaders share tacit knowledge and expertise in the community of practice providing an environment for questions, dialog, and information exchange. The best way to share tacit knowledge is through micro-communities of knowledge in small teams of five to seven members working together on group projects, and accepting each other through a common language and purpose (Anand et al., 2010). The best knowledge transfer emerges when compatible dialog exists, and the owner of the tacit knowledge and other individuals come from a similar frame of reference (Bennet & Bennet, 2011).

Members of organizational units transfer knowledge when members share a similar frame of reference, and facilitated the mobilization of existing knowledge resources. Leaders with social ties present opportunities for knowledge transfer and serve as channels for information exchange. Organizational leaders with social ties have additional opportunities for sharing knowledge (Maurer, Bartsch, & Ebers, 2011).

Employees interacting, learning, thinking, and using an empathetic perspective, build a frame of reference, allowing the mind to go deeper in exploring the world (Yong et al., 2013). Individuals experiencing enriching relationships demonstrate competence theory and assume people naturally strive for effective interactions with others that are beyond human. Wisdom is the highest part of knowledge and considered a goal to achieve the common good (Anand et al., 2010). Spiritual knowledge is the guiding purpose and value behind the application of tacit knowledge as information moves to knowledge and knowledge to wisdom (Bennet & Bennet, 2011).

Individuals use tacit knowledge to build connections with the conscious mind, develop resources stored in the conscious mind, and share resources with others. People share tacit knowledge with others when tacit knowledge becomes explicit. Leaders create an environment conducive to the creation and contribution of tacit knowledge and encourage open communication among knowledge workers (Bennet & Bennet, 2011).

Pioneers used social capital to provide new opportunities for knowledge transfer with little thought regarding how social capital added value to the organization and what types of knowledge to transfer (Maurer et al., 2011). The primary benefit of social capital is an association with the acquisition and transfer of knowledge. Innovators must create formally documented and accessible means of facilitating knowledge transfer.

Organizational members build social ties when knowledge transfer is lacking. Social interaction of leaders contributes to an assimilation of knowledge, providing organizational members opportunities to exchange and incorporate each other's knowledge. Leaders use social ties to increase the likelihood of locating knowledge in an expedited manner. Creative thinkers use large numbers of direct channels between organizations to access institutional knowledge resources increasing the ease and breadth of knowledge transfer (Maurer et al., 2011).

Individuals advance knowledge transfer between two parties using trust (Holste & Fields, 2010). Coworkers are willing to share knowledge when both parties are comfortable the knowledge will improve the organization. Members of organizations, trusting the noble intentions of others, are likely to ask for help, and less concerned with a loss in reputation doing so. Employees in trustful relationships assume a high level of reliability and quality of knowledge and reduce the cost of searching and verifying each other's knowledge resource (Maurer et al., 2011).

Contrary to findings by Holste and Fields (2010), trust is only conditionally acceptable in tacit knowledge transfer (Molina-Morales, Martinez-Fernandez, & Torlo, 2011). Leaders in organizations theoretically trust too much in relationships and risk adverse effects on innovative performance. Managers implement informal socialization processes as substitutes for trust building personal rapport and traditional cognitive schemes that facilitate knowledge transfer. Teams with long-term team memberships advance knowledge transfer among team members rather than trust. Trust remains important as an enabler of knowledge transfer within inter-organizational settings with reduced affect in intra-organizations (Maurer et al., 2011).

Managers face challenges managing social capital to maintain knowledge within the organization. Formal knowledge management practices require significant time (Maurer et al., 2011). Leaders should care and continue developing strategies to retain expertise to ensure a smooth succession for future leaders (Pennell, 2010).

Succession Planning Strategies

Twenty percent of the United States population will be 65 or older by the year 2030. Succession planning is a tool for business leaders to establish the organization's internal bench strength when building future leaders (Pennell, 2010). Succession planning is essential to remain competitive because the oldest of the baby boomer generation turn 65 years old in 2012 (Appelbaum et al., 2012). As 70 million Americans leave the workforce, companies will experience the most substantial economic and demographic changes in history.

Managers implement replacement planning to choose the best person for each job and succession for conventional replacement planning (McCall, 2010). Administrators use succession plans to transfer future ownership or management duties. Planning for continuity of business operations and succession planning are similar, however do not have the same meaning. Mentors help protégés work through the consequence of decisions and refer protégés to others when the mentor's knowledge is lacking. Mentors benefit from the mentor role by enhancing skills, retaining organizational talent, and creating legacies affecting the profession. Mentors act as a coach, facilitator, and networker (Huskins et al., 2011).

Chief executive officers leave the work place unexpectedly for three different reasons: (a) pass away, (b) resign, or (c) retire (Barron, Chulkov, & Waddell, 2011). Continuity planning affects the organization's entire workforce. Succession planning is a proactive and structured process for leaders to assess, calculate, and develop qualified employees to accept available career positions (Ojha, Gianiodis, & Manuj, 2013).

Leaders attempt to determine how succession influences the cultural contexts in the workplace (Renihan, 2012). Succession plans include timelines as well as: (a) a vision specific to the business, (b) values and guiding principles, (c) short and long-term goals, (d) personal goals and retirement plans, (e) stakeholders, (f) successor criteria, and (g) intended legacy for the organization (LaManna, 2012). Intended successors are those who demonstrate integrity, inspire trust, dedicate to the organization for the long-term, and possess necessary leadership and technical skills to do the job.

Succession planning should begin immediately, and not postponed until the company matures. Whether the intent is to sell the business, or leave the business to an individual, the right talent design ensures a smooth transition. Steve Jobs was an example of how to set up a succession plan by bringing in a qualified successor, rebuilding relationships, and communicating the succession plan to the Apple Corporation to prepare employees for long-term goals of the new leader (LaManna, 2012).

Devoting time to build a sustainable succession plan is essential for long-term success of every business; however, many leaders ignore succession planning to meet the primary objective of running a business (Schoonjans, Cauwenberge, & Bauwhede, 2011). Replacing skilled workers cost 50% or more than the individual's annual salary with the cost higher in jobs requiring superior skills, advanced training, extensive experience, and knowledge possessed by employees over the age of 50. Managers previously able to replace workers immediately out of school should think about creating flexible work schedules, telecommuting options, and training to encourage workers 50 years and older to stay on the job (Allen, Bryant, & Vardaman, 2010).

Economic theorists suggested employers seek to maximize efficiency and hire applicants with perceived output exceeding other applicants (Myung, Loeb, & Horng, 2011). Leaders should consider professional qualifications at the screening stage and sometimes-immeasurable characteristics become necessary during the succession planning process. Individual dynamics play fundamental roles in selection procedures within organizations and leaders should take care to maintain no discriminating practices exist for minority candidates (Myung et al., 2011).

Executives at PepsiCo implemented a successful talent development system used to develop organizational leaders. The executives created a leadership development program focused on three components: (a) identifying the potential leader, (b) developing the individual, and (c) moving the individual to another division. Moving the potential leader across divisions built experiences and enriched leadership training (Haskins & Shaffer, 2010). The strategies developed by PepsiCo helped to identify and build potential leaders from within the company, secures continuity within the organization for generations to come (Haskin & Shaffer, 2010). Leaders of schools in the state of Maryland adopted a succession plan similar to PepsiCo linking to five succession-related practices, including: (a) identification, (b) development, (c) promotion, (d) movement, and (e) retention (Renihan, 2012).

Leaders should take action in response to the accelerating slowdown in workforce development, although few have. Baby boomers may limit work activity once reaching the age of 60; however, with changes the United States Congress made to the Social Security retirement system, and age discrimination laws, older workers continue working. The United States Congress amended immigration laws to fill jobs for United States workers believed to be in short supply (Haveman et al., 2012).

Consequences of No Management Action

Incorporating contingency factors are critical to identifying change resulting in a succession event (Hutzschenreuter, Kleindienst, & Greger, 2012). Failing to improve workforce-planning initiatives leaves the organization in crisis and undermines the organization's competitive advantage just as failing to plan for future organizational growth (Pennell, 2010). The chief executive officer (CEO) is not the only person responsible for managing operations and strategy. Traditional thinking regarding succession planning as separate from leadership development, and restricts the ability of the company to acclimate to organizational restructuring (Leonard & Lang, 2010).

Scholars offered three succession models to consider when adopting organizational change. First, managers implement a common sense model, suggesting a new manager produced positive differences in performance. Boyne, James, and

Petrovsky (2011) suggested a common sense approach complementing the heroic concept of leadership assuming an individual had the potential to transform the fate of the organization and improved organizational performance. Leaders used a second model when problems within the organization forced administrators to assign a new leader (Boyne et al., 2011). Individuals experienced potential conflict before and after a succession event contributing to further destabilization in internal operations. Executives reported outcomes of falling performance, creating problems for the new incumbent to rescue the organization from the downward spiral intensified by conflict and indecision. Stakeholders executed a third model of succession by shifting blame or scapegoating. Administrators had no serious expectations the new executive would make a substantive increase in production. Senior managers were at fault for poor performance if organizational performance metrics fell below expectations (Boyne et al., 2011).

Leaders should prepare to transfer management duties for continuity of business operations and succession planning as part of the strategic planning process. Leaders should use caution not to confuse succession planning with replacement planning (McCall, 2010). Administrators need to develop succession planning when organizational infrastructure is implemented (LaManna, 2012).

The development of future organizational leaders with formal education found within the organization helped to establish the future workforce. Leaders are responsible for implementing succession planning to advance each member of the organization. Leaders spend countless resources on training to meet compliance or technical requirements rather than skills such as the ability to apply expert judgment and execute against goals and objectives (Hampel, Procter, & Deuter, 2010).

Succession planning for elected officials differs from public sector organizations and individuals should link political parties indirectly to organized interest. Elected executives make appointments linking to political parties; however, interested parties do not appoint or elect individuals into the state or local government positions. Civil service leaders staff governmental positions automatically as entrants advance through ranks and promotion paths through formal classification procedures (Frederickson, 2010).

Managers need assistance to determine internal candidates for promotion during a succession event. Administrators from the human resources area develop internal candidates equipped to step in as needed. Leaders use contingency strategies, including outsourcing agencies and executive search firms to acquire a replacement when losing a chief official (Cappelli, 2011).

Organizational leaders must shape the future by training others for leadership responsibilities. Leaders in service ranks provide a high level of service and protection, and to maintain business continuity leaders should prepare for future leadership tenures (Croteau & Wolk, 2010). Leaders prepare for succession plans by attending training sessions and seminars related to governance, leadership, human resources, and resource management. Organizational leaders should encourage future leaders to attend executive-level meetings and assist with executive-level projects. Potential leaders should be encouraged to obtain training and certifications beyond what administrators require (Croteau & Wolk, 2010).

Administrators from the Volunteer and Employee Management Strategy Group of the Australasian Fire Authorities Council (AFAC) encouraged managers to obtain training and formulate an effective tool for the fire service succession strategies. Leaders risked the loss of organizational expertise and conceptual knowledge as the workforce ages. Leaders from the AFAC identified succession capabilities necessary for levels of the organization, including: (a) influence, (b) ethics, (c) relationships, (d) strategy, and (e) people (Hayes & Omodei, 2011).

Managers should promote the development of subordinates through mentoring programs, and act swiftly. Leaders delegate tasks, and supervised protégés, who learn by doing; however, mentors must prepare to step in, or coach, when needed. Organizational leaders should establish formal mentoring programs to determine goals, share ideas, and be open for continuous feedback from mentors (Craig, Allen, Reid, Riemenschneider, & Armstrong, 2012).

Administrators controlling the board of directors accept responsibility for decisions related to leadership turnover. Administrators dismiss poorly performing executives occasionally and may apply pay cuts fitting to dismal stock performance. Senior leaders in inadequately performing industries continue to reduce executives' wages or aggressively remove the chief executive officer (Gao, Harford, & Li, 2012). Boards of directors in better-governed organizations used pay cuts and terminate executives for meager performance. Administrators implement benefit reductions or force turnover to penalize poorly performing executives when employing strong government structures (Gao et al., 2012).

Organizational leaders should initiate leadership development processes after identifying a proper coach and future challenges of the organization. Managers should link strategy and talent development through leadership, develop training for transition points, and coach executives to practice leading by teaching. Corporate board members are duty-bound to select high potential leaders and consider using multi-rate feedback and annual assessments in the selection process (Haskins & Shaffer, 2010). Administrators need to incorporate succession planning efficiently to better support rapid and frequent reorganizations (Leonard & Lang, 2010). Administrators identify gaps of knowledge and develop leadership development programs to prepare candidates for leadership positions to secure business stability.

Baby Boomers who leave the workforce lay the groundwork for new recruits to complete the same tasks. Managers compare employees to each other instead of forthcoming work requirements. Leaders comparing individuals often consider personal factors such as age. Human resources professionals created age discrimination laws to protect aging employees (Campion, Guerrero, & Posthuma, 2011).

Affect of Successfully Implemented Strategies

Leadership transition is not a painful experience when administrators used succession planning to sustain success from the first day of the transition. When leaders thoughtfully planned the succession implementation, resources worth protecting remained secure, and relationships remained unharmed (Christy, 2011). Succession planning includes moving individuals around the organization into different roles gaining a deeper sense of how the organization operates (McDonnell et al., 2010). The individual groomed for succession should prepare to step in when the need arose without disrupting the organization (Rhodes, 2012). Leaders conducting succession planning understand the needs of the successor and select the individual to succeed the incumbent (Zepeda, Bengtson, & Parylo, 2012).

Managers in training may speak out of turn without an experienced member of the team to mentor and provide feedback. To familiarize the mentees with daily routines, leaders are most effective when coaching and mentoring on location in the environment in which the mentees will work (Emelo, 2010). Leaders sharing personal experiences provide additional opportunities for learning than participating in class training (Thomas & Kamalanabhan, 2012).

Executives retain older workers through phased retirement, allowing employees close to retirement age to reduce work hours or work for employers in a different role. Leaders used corporate alumni networks to transfer knowledge of baby boomers after retirement. Managers of corporate alumni networks facilitated the post-retirement transfer of knowledge to recover mastery of their former employees. Administrators of corporate alumni networks create portfolios to contact retirees for knowledge when needed (Appelbaum et al., 2012).

Leaders must brace for a retirement crisis accompanied by an unprecedented loss of industry experience and tacit knowledge (Erdogan et al., 2011). Many leaders ignored succession planning to meet the primary objective of running a business; however, devoting time to a succession plan is essential for every business (Schoonjans et al., 2011). Managers may avoid legal complications because of downsizing by focusing on future work and experiences of employees (Campion et al., 2011).

Qualitative Approaches to Retaining Knowledge

Literature on qualitative research has increased since the 1960s and scholars attribute the rise to a number of factors. Increased discontent with scientific assumptions contributed to the rise in qualitative research. In addition, the growing movement against positivism and the emphasis on the objectiveness and empirical analysis contributed to the growth in qualitative research. As other theoretical views gained prominence, qualitative research increased (Alasuutari, 2010).

Scholars viewed a qualitative method as useful for research in retaining knowledge (Daghfous, Belkhodja, & Angell, 2013; Emelo, 2012; Fleig-Palmer & Schoorman, 2011). Malik (2012) asserted researchers commonly used qualitative methods in research on retaining knowledge. For example, Malik maintained the successful implementation of transferring knowledge between team members was a result of individuals within the group possessing a comfort level to communicate, interact, and work together with ease as a collective unit. Data collection occurred through semistructured interviews with junior managers and sales executives. In addition, Daghfous et al. employed a qualitative method to understand knowledge loss and asserted leaders should retain knowledge, improve coordination among units, develop networking strategies, and develop organizational routines to mitigate knowledge loss and increase knowledge retention.

The case study design holds significant value for research about retaining knowledge. Through face-to-face interviews, the data provided a better understanding of how tacit knowledge informed program initiatives in public health (Kothari, Rudman, Dobbins, Rouse, Sibbald, & Edwards, 2012). The findings from the literature review supported the suitability of a qualitative method to address the central research question instead of another method or design. The information from the literature review supported the view a qualitative method benefits research focused on exploring perspectives. Through the literature review, I demonstrated scholarly acknowledgement of the value of a qualitative method for exploring knowledge retention. Section 2 of this study indicated further justification for the research method, design, and strategies for research.

Transition

In Section 1, I discussed the: (a) foundation of the study, (b) the problem and purpose statements, (c) research question, (d) the conceptual framework, (e) operational terms, (f) the significance of the study, and (g) review of the literature. In Section 1, I explored how knowledge management principles assisted in retaining tacit knowledge from baby boomers. In Section 2, I expanded on the: (a) role of the researcher, (b) the qualitative method and single-site case study research design, (c) population and sampling, (d) ethical research, (e) validity and reliability, (f) data collection, (g) analysis and (h) organization.

Section 2: The Project

I conducted a qualitative case study using one government organization in the Midwest United States to learn how government leaders retained tacit knowledge from baby boomers. Leaders provide personal insight regarding the development and need for knowledge management principles (Andreeva & Kianto, 2012). I gathered additional government documentation at the time of the interview from the participant, and viewed physical artifacts to triangulate data from the study. Physical artifacts included public organizational charts, succession planning material, and information regarding knowledge management systems. The results could assist government agencies to retain and transfer tacit knowledge from exiting baby boomers to younger government employees.

Purpose Statement

The purpose of this qualitative case study was to explore what strategies local government leaders might use to retain tacit knowledge of baby boomer employees I used face-to-face, semistructured, open-ended interviews with at least six leaders within one government organization in the Midwest United States to understand how leaders retained tacit knowledge. Participants were members of government and were leaders in one local government agency. Six participants engaged in the face-to-face interview process. The interview questions solicited leaders' perceptions and experiences to construct strategies common among respondents. I used additional information from organizational charts showing the management structure, posters representing former leaders, and notes obtained during the interview to triangulate the data findings stemming from the collection process. Leaders used the posters and organizational charts to share knowledge and tell the agency's story as a part of the mentoring process. I discovered patterns within the gathered data by identifying, exploring, and verifying repeated themes. The results of this study may assist leaders to retain tacit knowledge because of a loss in human capital as baby boomers leave the workforce. Study data may affect positive social change by identifying strategies to retain tacit knowledge. The findings may benefit an organization's employees, families, and communities by: (a) investing in programs to retain institutional knowledge, (b) recruiting necessary talent, (c) changing existing programs and policies to test the development of new approaches to manage an older workforce, and (d) becoming pioneers for the upcoming generations regarding workplace flexibility.

Role of the Researcher

The role as a researcher was to collect and analyze data, report findings accurately, maintain the confidentiality of the study participants, and conduct research within ethical boundaries. In qualitative research, the investigator acts as an instrument (Xu & Storr, 2012). The quality of data was contingent on my expertise who served as an instrument in generating data (Xu & Storr, 2012). I have 15 years of professional interviewing experience, working as a management development trainer, to help facilitate a honest sharing of personal experiences. I had no personal or business relationships with the participants of the study.

Participants

Study participants included a purposive sample of six local government leaders from one agency drawn from a pool of 16 candidates. The small sample size was appropriate to gain the required level of certainty needed to understand how business leaders retained tacit knowledge (Yin, 2014). Participants in the qualitative case study were leaders in one government agency in the Midwest United States. I conducted face-to-face interviews remaining sensitive to time constraints of the participants. Interviews took approximately 45 minutes each. My extensive experience conducting face-to-face interviews made the interview format ideal for the study.

Combination, or mixed purposeful sampling indicated credibility and certainty in the participant selection process (Guest, Bunce, & Johnson, 2006). The use of purposive sampling ensured participants had the appropriate knowledge required to inform on the topic (Yin, 2014). Before making contact with participants, I: (a) gained approval to conduct research from the Institutional Review Board; (b) contacted one government agency introducing myself, the study, and solicited interest from the agency's to participate in the study; and (c) began an exploration of related documentation located on the agencies web site. Participants had independent authority as a decision maker within their department. I located the participants' e-mail addresses on the agency web site, emailed potential participants to partake in the study, and provided information about the problem investigated and the purpose of the study. I explained the interview, confidentiality, and consent details in the data collection process. Next, each participant who agreed to participate replied by e-mail with the words I consent*.* The signed consent form included: (a) a description of the study, (b) my role as an interviewer, (c) the time commitment needed to complete the interview, and (d) the rights of participants to answer some, or none of the questions, and the storage process for securing information confidentially (see Appendix A). No participants withdrew from the study.

I concealed the names of the individuals and organizations, ensuring confidentiality of the participants. Study participants received a letter and number (P1, P2), to distinguish participants, and to apply a unique identifier throughout the research process to protect anonymity (Sadler, Lee, Lim, & Fullerton, 2010). The sample size of six participants provided sufficient data and provided saturation (Sadler et al., 2010). Protecting the anonymity of participants was critical to maintain the integrity of the study. I first assigned a unique identifier and removed participant names from collected data pertaining to the working documentation of the study. I locked a master list of unique identifiers in an external hard drive in a fireproof safe, to protect participant confidentiality. I had sole access to the data, and I will destroy data after 5 years. Second, I explained, in the consent forms, the care of confidential information and the right to answer none, or some of the questions without consequence. Third, I explained to participants, notes from the interview process remained confidential.

Establishing a cohesive relationship with participants was essential to gain sufficient information and to perceive the level of comfort with the face-to-face interview process (Yin, 2014). Creating a working relationship required welcoming participants and explaining the research objectives and intentions. I invited participants to ask any questions, followed by a few eligibility questions regarding managerial status before I conducted the face-to-face, semistructured open-ended interview questions. Interviews commenced one week after initial e-mail contact giving participants time to reply with the words I consent. Prior to the interviews, I e-mailed a copy of the consent form to participants (see Appendix A).

Research Method and Design

Researchers determine what information may help them to understand a particular problem or issue (Denzin, 2009). With an understanding of what added value to perspectives, researchers used established methods and designs to seek information to answer central research questions (Denzin, 2009). The central research question underlying the study was: What strategies do local government leaders need to retain tacit knowledge from retiring baby boomers? To answer this question, I studied various methods and designs to help me gain a deeper understanding of the issue.

The guiding framework of the study research question was descriptive and interpretive; characteristics of the qualitative research method (Bloomberg & Volpe, 2012). The study findings may enlighten government managers about how to retain tacit knowledge as employees reach retirement age. In this section, I reviewed research methods and designs, and justified the use of a qualitative case study approach to research the problem of retention of tacit knowledge as baby boomers leave the workforce.

Research Method

Three common methods used in research are quantitative, mixed methods, and qualitative research. The characteristics of quantitative research are numbers, objectivity, and generalizability (Stanley, 2011). Quantitative examiners create hypotheses, operational variables, and test for statistical significance (Williams, 2007). A quantitative researcher gathers and analyzes data using a numerical format. Researchers choose a quantitative approach to identify the frequency of behaviors, assessing dependent and independent variables, and testing a hypothesis. Tools used in quantitative inquiry include surveys using predetermined responses within a narrow context, which ensures that respondent answers fall within a measurable framework (Maxwell, 2010). Kang, Rhee and Kang (2010) conducted a quantitative study about the retention of tacit knowledge and focused on relationships between employees as a determinant of knowledge transfer. Butler (2010) conducted a quantitative study to examine specific types of knowledge retained in organizations. Both of the studies added valuable information to the understanding of tacit knowledge retention; yet did not provide insight on why the information retained held value or what particular value the information held (Butler, 2010). I did not select the quantitative method because I wanted to learn from leader perspectives rather than examining the presence or absence of a phenomenon through statistical analysis as in quantitative research.

A mixed methods researcher combines the attributes of a quantitative approach, such as using surveys, and qualitative approach, such as open-ended questions to seek a broader scope of information. Mixed methods approaches are sequential, concurrent, or multiple-level (Muskat et al., 2012). Each approach varies by the order in which quantitative and qualitative inquiry occur. Mixed methods practitioners seek to enhance and elaborate results from one research method with the conclusions from another research method (Muskat et al., 2012). Mixed methods investigators seek to discover contradictions in research, which was not appropriate for addressing the central research question posed in this study (Muskat et al., 2012).

Qualitative investigators draw data from: (a) words, (b) images, (c) peer-reviewed articles, and (d) observations lending themselves to: (a) rich, (b) thorough, and (c) detailed descriptions of: (a) complex behaviors, (b) processes, (c) relationships, (d) settings, and (e) systems to understand the business problem (Hanson, Balmer, & Giardino, 2011). The qualitative approach uses open-ended questions, based on the research design and data collection procedures. Qualitative research questions provide significant understanding of the business problem (Yin, 2014). Previous qualitative researchers focused on determining what tacit knowledge was and how tacit knowledge differed from explicit knowledge (Dinur, 2011). Using qualitative inquiry, I sought to understand the problem of retention of tacit knowledge as baby boomers left the workforce. The qualitative method was suitable for the study to determine how organizational leaders retained tacit knowledge (Hanson et al., 2011). I sought understanding of the data using face-to-face, semistructured, open-ended interviews questions, available documentation, and physical artifacts, to reach saturation (Erlingsson & Brysiewicz, 2012). The qualitative researcher applies theory to document a gap in the literature, provides comprehensive accounts of observation and data, and gives a personal perspective to the phenomenon studied through narratives and descriptions (Bansal & Corley, 2012). Conversations, memos, recordings, and interviews provided the information required for qualitative research analysis (Bansal & Corley, 2012). I engaged in face-to-face interviews, and ask semistructured, open-ended questions to gain a deeper understanding of issues related to tacit knowledge retention. I triangulated the study by exploring related documentation available within the agency such as: (a) posters, (b) organizational charts, and (c) physical artifacts including the agency's website. I applied qualitative inquiry and engaged inductive reasoning to understand tacit knowledge retention.

Research Design

Researchers conduct an exhaustive review of methods to determine fit between the central research question and the form of research method and design applied. A researcher choosing to conduct qualitative research choses among five designs. A researcher choses a research design which best reflects the purpose of the study. Five qualitative research designs include: (a) phenomenology, (b) grounded theory, (c) narrative, (d) ethnography, and (e) case study.

Shank (2006) stated the foundation of qualitative phenomenological inquiry began with the person, and the person's awareness of the world and its orientation toward interpreting human experience. Van Manen (1990) observed hermeneutics and phenomenological inquiry were two used methods for conducting social-science research. Research based on qualitative phenomenological inquiry assisted in providing an understanding of the human experience (Van Manen, 1990).

Researchers use grounded theory to pioneer new theory or develop an explanation of a phenomenon (Bloomberg & Volpe, 2012). Grounded theory was not suitable to support the exploration of the experiences and perceptions of leaders in this study. I acquired perspectives on strategies to retain tacit knowledge, and not develop a theory of tacit knowledge.

Researchers conduct ethnographic studies to investigate a group or cultural activity unique to a specific population (Kar & Samantarai, 2011). I was not studying a unique culture, or group behaviors related to tacit knowledge retention and did not choose an ethnographic design.

Narrative researchers seek the meaning of phenomenon through stories (Kar & Samantarai, 2011). Narrative inquiries provide overviews of a person or group through the eyes of the researcher (Jorgensen et al., 2012). Researchers use narrative designs to explore life stories, and were not suitable for the study.

Finally, case study researchers focus on obtaining answers using how and why questions (Yin, 2014). A case study researcher reviews cases through detailed, in-depth data collection involving multiple sources of information such as observations, personal interviews, and reports fortifying meaning (Kar & Samantarai, 2011). I used a qualitative case study for this study.

I used a qualitative method to gain rich, thick data through shared perspectives from business leaders. A case study design encompassed interviews using open-ended questions, member-checking, and additional secondary sources to triangulate the findings stemming from the data (Yin, 2014). To summarize, the purpose of this qualitative case study was to explore what strategies local government leaders needed to retain tacit knowledge of baby boomer employees.

Population and Sampling

The population consisted of six leaders based in the Midwestern United States. I accessed government agency leaders through the government public database. I did not require a letter of cooperation from the agency because the participants selected maintained the highest level of authority within the agency, including the decision to engage in research. Further, I inquired with the Walden University IRB for clarification and this population met the authority criteria. The number of participants in qualitative research depends on differences within the people, phenomenon, or setting, and the sample size is large enough to achieve saturation (Rohde & Ross-Gordon, 2012). The individuals met the criteria of the study, which was: (a) leader for a minimum of one year, (b) available for a face-to-face interview, and (c) supervised at least one employee. The criterion for participation is located on the Informed Consent form (see Appendix A). The perspectives of six participants drawn from the candidate pool meeting the criteria, combined with both the secondary materials, and physical artifacts to triangulate the study, was significant to gain a deeper understanding of what strategies business leaders needed to retain tacit knowledge.

I conducted each face-to-face interview using an iTunes® SpeakEasy Voice Recorder, with permission from the participant, to recall information correctly. A purposeful sample of six participants offered a suitable range of experiences, perceptions, and knowledge to gain a deeper understanding of succession planning within this setting. Orser, Elliott, and Leck (2011) suggested purposeful sampling to capture the relevance, experiences, and knowledge related to the central research question. I used six participants, to gain rich detail of knowledge management and transfer practices within one local government agency. Each participant described the strategies they used to retain tacit knowledge.

The six participants in the study responded to semistructured, open-ended, interviews asked in a face-to-face, conversational manner. Applying a semistructured interview provided each participant the opportunity to elaborate their responses to study beyond the meaning of the phenomenon (Longhurst, 2010). Berta and Laporte (2010) found semistructured, probing interview questions increased interview reliability and validity by infusing a clarity, meaning, and depth to the information gathering process. In this study, I asked 11 semistructured focused interview questions to gain a deeper understanding of retaining tacit knowledge.

Ethical Research

A research design should conform to an acceptable code of conduct, social acceptability, and legal requirements (Van Deventer, 2009). I conformed to IRB ethical and legal requirements, ensuring no harm or foreseeable risks came to participants in the study. Participants received consent forms (see Appendix A) via e-mail, after IRB approval was granted. There were individuals with equal power involved in the study, all serving different purposes, overseeing departments. These individuals were the top decision makers with full authority and did not receive oversight within the agency. Participants received a consent form explaining the role of the researcher, intent of the study, role of participants, and confidentiality process. Once participants agreed to participate, they replied with the words I consent by e-mail, I began contacting participants to arrange an interview, and remained sensitive to participant time constraints.

The consent form included detailed information regarding the study. I offered no incentives for participating in the study, and kept unique identifying characteristics of participants confidential. I recorded the face-to-face interviews using the iTunes® SpeakEasy Voice Recorder, stored data on an external drive locked in a fire-protected safe accessible only by me, and I will destroy data after 5 years.

Data Collection Instruments

The goal of qualitative researchers is to uncover perspectives and experiences regarding the participants and situations (Jacob & Furgerson, 2012). The instrument for this research was open-ended interviews in a semistructured format. In qualitative research, the investigator acted as an instrument (Xu & Storr, 2012). Abdullah and Eng (2012) used semistructured interviews for evaluating the effect of communication skill level of vision-impaired persons on employment. Likewise, Rabionet (2011) and Schatz (2012) recommended using a semistructured interview process because the open-ended format permitted participants to speak freely regarding the topic subject. Rubin and Rubin (2012) posited semistructured interviews were the most reliable means for addressing open-ended questions in exploratory studies. I used semistructured interviews to understand what strategies leaders needed to retain tacit knowledge.

I asked 11 open-ended interview questions (see Appendix C). With the permission of the participant, I recorded the face-to-face interviews and transcribe the data. I removed all personal identifiers before shipping the recorded interviews, and the transcriptionist signed a confidentiality agreement to protect the identities of participants (see Appendix D). Transcripts contained a corresponding letter and number provided to each interviewee. During the face-to-face interview process, I asked the participants for additional source information and they provided organizational charts and posters as artifacts. The organizational charts showed the management structure, and posters represented stories regarding former leaders. I used notes taken during the interview to gain a deeper meaning and triangulate the data findings (Yin, 2014). Triangulation was a method to check and establish the validity by analyzing research questions from multiple perspectives (Guion, Diehl, & McDonald, 2011). Following the interviews, I used member-checking to ensure appropriate interpretation of the information collected. I member-checked by contacting participants by e-mail, had them review my interpretation of their contribution, and requested verification of the accuracy of collected information within 5 business days. I used interviews, additional source information, and physical artifacts to triangulate the study (Guion et al., 2011). I will keep an external drive locked in a fire-protected safe accessible only by me, and destroy data after 5 years.

I gained perceptions about how leaders retain tacit knowledge from baby boomers. I acknowledged patterns within the gathered data by identifying, exploring, and verifying repeated themes. The themes may expose deeper meaning and insights for addressing the research question (Bloomberg & Volpe, 2012).

Data Collection Technique

I conducted this qualitative case study to explore what strategies local government leaders used to retain tacit knowledge of baby boomer employees. I collected data for the study through face-to-face, semistructured interviews, documentation, and physical artifacts. I conducted face-to-face interviews asking 11 open-ended questions (see

Appendix C). Instruments used to conduct the interviews included a different conference room or office for each of the participants, a clock to monitor interview time, the iTunes® SpeakEasy Voice Recorder, notepad, pencil, and paper. I will store collected information on an external drive locked in a fire-protected safe accessible only by me, and destroy data after 5 years by fire.

Once I gained approval by the IRB and Walden University to commence my investigation, I scheduled interviews with participants, contacting them a day in advance to confirm interview appointment and to reaffirm participant rights, study intent, and interview process. The following day, participants were expected to engage in the interview process, and I transferred iTunes® voice recording to a USB stick, typed notepad notes into a Microsoft Word® document, and locked them in a fire-protected safe accessible only by me. I will destroy data after 5 years by fire.

I did not perform a pilot study; however, participants received encouragement to seek clarity regarding questions throughout the interview process and gained support to understand the wording and meaning of the questions. I reminded participants of the right to answer none, or some of the questions without penalty and the interview could stop at any time. No participants declined to answer interview questions.

I informed participants only completed responses constituted data toward the study, and reminded participants of the consenting process, the confidentiality agreement, and purpose of the study. I interviewed six participants and used an interview protocol (see Appendix B) ensuring an identical scripted interview process and questions to enhance reliability. Prior to each interview, I reviewed the interview protocol with the participant and provided an opportunity for questions.

A professional transcription firm transcribed the audio recordings after signing a confidentiality agreement (see Appendix D). I concealed names to protect participants and used member-checking by sharing the findings of my interpretation of the data with participants for verification (Marshall & Rossman, 2011). I emailed participants my interpretation of their comments to verify and did not receive any requests for change.

I obtained and analyzed documentation related to knowledge management, succession planning, and any other topics supporting the research to triangulate the data. Physical artifacts, such as the agency website, organizational charts, and posters, provided significant supporting information for the study. The organizational charts showed the management and reporting structure, and the posters contained the history of accomplishments of former leaders. Upon completion of the study, I provided a 1-page summary of findings, to participants, as a courtesy.

Data Organization Technique

I organized the data to ensure order, recall, and confidentiality. Data remained in a password-protected database, or secure cabinet, and I will destroy data after 5 years. I collected data using three methods: (a) voice recordings using an iTunes® SpeakEasy Voice Recorder, (b) journal notes used throughout the research to document additional nuances in the interview process, and (c) artifacts and documentation retrieved from websites or organizational documentation such as policies or articles. A pencil and paper were the primary tools for recording the subtle nuances in the interview process. Codes (P1, P2) protected personal identities of participants and appeared in documentation and databases as unique identifiers for maintaining the confidentiality and security of information from this study.

Data Analysis

I used this qualitative case study to explore what strategies local government leaders might use to retain tacit knowledge of baby boomer employees. In this qualitative study, six participants answered 11 semistructured interview questions (see Appendix C).

Interview Questions

1. What is your perception of how the exodus of baby boomers may affect your organization?
2. What is your perspective of the strategies your organization uses to capture tacit knowledge from baby boomers?
3. What is your experience retaining tacit knowledge from a person reporting to you?
4. What obstacles, if any, obstruct your attempts to retain tacit knowledge of baby boomers?
5. How, if at all, are you addressing these obstacles?
6. What tacit knowledge transfer strategies will you share with colleagues before you retire?
7. What tacit information within the workplace holds value?
8. How do you determine what tacit knowledge holds a specific value?
9. What methods, if any, do leaders use to store and retain tacit knowledge retrieved from exiting baby boomers?

10. How do personnel share tacit knowledge in your organization?
11. What additional information can you provide to help me understand how your organization gathers and retains tacit knowledge?

Systems theory, transformational leadership theory, and knowledge management theory provided a foundation for the study designed to explore what strategies local government leaders used to retain tacit knowledge of baby boomer employees, and ties in how data relates to conceptual framework. von Bertalanffy (1950) posited systems theory applied systems principles to aid a decision-maker with problems of: (a) identifying, (b) reconstructing, (c) optimizing, and (d) controlling a system. Participants in this study identified a lack of structured systems obstructed efforts to retain tacit knowledge. Transformational leaders are successful by engaging subordinates in shared exchange processes based on interpersonal trust, common loyalty, and long-term reciprocity with supervisors (Tse et al., 2013). Participants in this study identified mentoring as a strategy to retain tacit knowledge. Further, organizational leaders faced challenges linking knowledge management theory to practice, and lacked understanding with respect to the association between knowledge management and strategy (Venkitachalam & Busch, 2012). Participants in the study were aware of a need to incorporate knowledge management sharing principles, but undecided how to develop a knowledge management strategy for the agency.

I analyzed each response to the 11 semistructured interview questions, with additional source materials from the investigative process, such as documents, records, and policies. The purpose was to identify any significant themes regarding leader strategies for retaining tacit knowledge.

The analysis of the data was a four-step process beginning with the retrieval of transcribed data from the transcriptionist along with the secondary information gathered from the study site (Bloomberg & Volpe, 2012). I used traditional text analysis as opposed to computerized text analysis. Researchers use traditional text analysis to interpret meaning from data, whereas a computerized method may indicate positive and negative qualifying statements (Bright & O'Conner, 2007). With raw data in hand, I first wrote out words and short phrases onto a paper (Bright & O'Conner, 2007). Second, I drew repeated words together highlighting any adjoining terms, gradually establishing clusters of repeated and related words, which I coded. Third, I formed the coded clusters into themes. The fourth and final step was to draw meaning from the highlighted themes to establish meaning and understanding of both common and unique patterns of information. For identification codes, I assigned each study participant a unique letter and number based on their position in the study (P1, P2). I separated long responses into meaning units, to bracket response entries into separate code units, consistent with the study objectives (Bloomberg & Volpe, 2012).

Based on responses from the interview questions and secondary information gathered, I developed themes from the assembled data by analyzing recurring words, drawing the words, and any related connected terms together to form clusters of information. The interview results required analysis and coding to determine if themes emerged between participant experiences of the phenomenon (Bloomberg & Volpe, 2012). The: (a) coding, (b) instrument, (c) interpretation, and (d) explanations might support the central research question of this study.

Reliability and Validity

Reliability

Specific practices were necessary to assure the design reliability. Reliability referred to the ability for other researchers to repeat the study with consistent results (Thomas & Magilvy, 2011). Dependability occurs when another researcher can follow the audit trail of the initial researcher (Thomas & Magilvy, 2011). Audit trails were achieved by: (a) describing the purpose of the study, (b) describing the process for selecting participants for the study, (c) describing the data collection process, (d) describing how the data was interpreted for analysis, (e) discussing the research findings, and (f) communicating techniques to determine credibility of the data (Thomas & Magilvy, 2011). To ensure reliability, I provided an interview protocol (see Appendix B) identifying steps taken to conduct the interviews. Following the interview protocol reinforced the reliability and repeatability of the study. Repeating the original approach will enable other researchers to replicate the design supporting this study reliability (Thomas & Magilvy, 2011). Additional strategies to ensure reliability included: (a) aligning activities and interview questions with the central research question, (b) documenting and storing data (c) securing data and protecting confidential information (d) applying standard analytical approaches consistent with case studies, and (e) destroying stored, confidential information after 5 years (Yin, 2014).

Validity

Thomas and Magilvy (2011) suggested three criteria for testing the validity of qualitative research, including credibility, transferability, and confirmability. To ensure credibility, researchers describe the phenomena of interest through the participants' eyes. Participants were the only individuals who could rightfully judge the integrity of the results, and verified interview transcriptions confirmed data integrity. Transferability refers to how the research results applies to other similar agencies, and if the results assist other organizations struggling with a transfer of knowledge. A case study researcher focuses on a small sample, rather than generalizability of the findings. Confirmability refers to how results align with accepted previous results, particularly when a researcher applies a similar case study protocol (Thomas & Magilvy, 2011).

Strategies to assure validity of the study's findings included triangulating the data, member-checking, applying a conceptual framework to guide the study (Marshall & Rossman, 2011) and using a rich, thick description (Thomas & Magilvy, 2011). Triangulation validated the study by exploring a phenomenon through various lenses; in the study, I used interviews, documentation, and physical artifacts. Marshall and Rossman (2011) suggested providing a conceptual framework to guide the study. The conceptual frameworks guiding this study were systems theory, transformation leadership theory, and knowledge management theory. Using a rich, thick description ensured a deeper understanding of information encapsulating detail and breadth in the context of information shared (Thomas & Magilvy, 2011).

Transition and Summary

The objective of Section 2 was to describe the qualitative, single-site, case study approach of this study. Consenting respondents participated in recorded and transcribed meetings. Possible themes emerged through data coding and analysis. Participant information was confidential. Section 3 of the study consists of an analysis of the data, presentation of outcomes, and the implications for professional practice.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of conducting this qualitative, case study was to explore what strategies six local government leaders in the Midwest United States used to retain tacit knowledge of baby boomer employees. I developed the central research question to guide my understanding of the different perspectives of leaders, and the strategies used to retain tacit knowledge from baby boomers. I collected data using purposeful selection of the participants who answered open-ended interview questions. I recorded, transcribed, and analyzed all questions. Coding revealed the results of the study, and obtaining common themes identified during the analysis process.

I used the organization's website to review the history of the organization, leaders and their biographies, and collected artifacts from the participants that included organizational charts, displaying the hierarchy of the departments, and posters with detailed artwork depicting decades of progress, and generations of former leaders. One participant pointed out a poster of generations of former leaders portraying the legacy of the agency, and used this poster to tell the story of former leaders and their accomplishments to younger employees.

The central research question of the study was, What strategies do local government leaders need to retain tacit knowledge from retiring baby boomers? From the central research question of inquiry, the focus for the interview questions was as follows:

1. What is your perception of how the exodus of baby boomers may affect your organization?

2. What is your perspective of the strategies your organization uses to capture tacit knowledge from baby boomers?
3. What is your experience retaining tacit knowledge from a person reporting to you?
4. What obstacles, if any, obstruct your attempts to retain tacit knowledge of baby boomers?
5. How, if at all, are you addressing these obstacles?
6. What tacit knowledge transfer strategies will you share with colleagues before you retire?
7. What tacit information within the workplace holds value?
8. How do you determine what tacit knowledge holds a specific value?
9. What methods, if any, do leaders use to store and retain tacit knowledge retrieved from exiting baby boomers?
10. How do personnel share tacit knowledge in your organization?
11. What additional information can you provide to help me understand how your organization gathers and retains tacit knowledge?

The findings of the study revealed three distinct themes regarding strategies to retain tacit knowledge from baby boomers: (a) mentoring, (b) generational differences, and (c) lack of structured systems. From the data collected and analyzed, I found the first theme, mentoring, was the most common way to share tacit knowledge from baby boomers. I also found that even though mentoring was a popular method to share tacit knowledge, not all baby boomers were willing to share knowledge, and some baby boomers were reluctant to share any knowledge unless strongly encouraged by a leader.

Participants mentioned passing work experiences down to young or new employees, and that there were three common techniques used to mentor younger employees that included: (a) informal water cooler meetings, (b) war stories, and (c) cross-training opportunities. The second theme participants mentioned was generational differences within the organization, and because the value some generations placed on culture, employees would not interfere with a higher ranking official when they thought they were “going down a bad path” because of the chain of command (P4). The participants mentioned how keeping younger generations on the job was a challenge, and younger employees did not have the work ethic or loyalty, of the baby boomer generation. Younger generations were less likely to stay in the position for the long term, and were willing to leave the organization for a better opportunity. A lack of structured systems to collect and retain tacit knowledge was the third theme. Leaders shared data through email and meetings.

One participant stated, “knowledge was power, and some employees are perceived as being so valuable to the agency that you could not get rid of them” (P5). Artifacts included organizational charts and posters with detailed documentation of the leadership hierarchy. Another participant pointed to a poster of generations of former leaders portraying the legacy of the agency, and used this poster to tell the story of former leaders and their successes to younger employees.

Presentation of the Findings

In this study I addressed the research question and the reasons and influences in relation to sharing tacit knowledge. I organized the collected data into themes. The evolved themes from participant interviews, documentation, and artifacts are as follows: (a) mentoring, (b) generational differences, and (c) lack of structured systems.

The purpose of the study was to explore what strategies government leaders used to retain tacit knowledge of baby boomer employees. The participants and supporting documents provided rich perspectives on strategies to retain tacit knowledge from baby boomers. Exploring leader strategies to retain tacit knowledge from retiring baby boomers was a prominent aspect to the research study. The following subsections are descriptions of the participant sample, each of the three themes, how these data supported the central research question, alignment with existing research, and validated the choices of: (a) systems theory, (b) transformational leadership theory, and (c) knowledge management theory as the conceptual frameworks for this research.

The research consisted of six face-to-face, semistructured interviews with 11 predetermined questions, presented to participants from a government agency in the Midwest United States, to determine strategies to retain tacit knowledge from retiring baby boomers. The participants interviewed were government leaders possessing at least one year of experience as a leader with at least one person directly reporting to them. By selecting six participants, the researcher could accurately identify the perceptions of primary leaders about strategies to retain tacit knowledge from baby boomers throughout the agency.

Theme 1: Mentoring

The first theme emphasized the participants' perception of mentoring and its importance in retaining tacit knowledge. Communication was not adversarial between the employees and the leaders, it was a common goal (P2). From the results I discovered that 100% (6/6) of participants thought mentoring was critical to share tacit knowledge. One participant affirmed they were cognizant of individuals with specific information and knowledge, and indicated they did not want to stovepipe that type of information (P5). Another participant stated they hoped to develop and retain a knowledge base that provided an ability to instruct new people with inherent information that certain individuals maintained, and not previously documented (P6). Participants indicated they attended multiple meetings and shared emails and copied others who were not available to attend meetings. Participants mentioned the importance of pushing knowledge out to all peers, and also pushing the information to subordinates to empower them. The participants' supporting statements are listed in Table 1.

Table 1

Table 1 Theme 1. Mentoring

Participant	Participant Comment
P2	We talk candidly about the people that have institutional knowledge. I try to coordinate that information flowing between the supervisory and management group in my division. It's a little bit easier to push down to my first-line supervisors in developing that relationship that hinges on mentoring. You'll always hear the story, "Well back in the day... or back when I was in that division" ... of course those war stories have some value.
P1	I think that we try really hard to mentor. We try to place senior staff

with new staff from the time that they come into the organization they're assigned a mentor…

…but many instances the information is passed verbally from the experience component of the senior employee back to the new employee

P4 I've had some good mentors through the time. This organization is good about trying to sit and elicit questions and answers. I actually sat down on several occasions, discussed topics, experiences, how they handle things. I know that I could still pick up the phone.

P5 …from those meetings the supervisors go to their respected shift assignments, and they take that information and pass it down to their subordinates. Again some knowledge is easier to pass down than other...

When tragedy strikes, we find a person that can best help us knowledge-wise to get through it.

P6 I think a lot of the means that we use to communicate are informal means, whether it's a trainer-trainee relationship or the old water cooler method where they're just hanging around and talking.

They'll come in and say "We did this 20 years ago, and these are the things we ran into," or "You guys might think about doing this or doing that."

They'll start bringing out the experience that they've had and "We started it doing it this way x number of years ago because of this or that,"

I think most communication is done by the water cooler method. There are a lot of conversations at all levels in the department from line staff to upper management that occur back there. I think a lot of the tacit knowledge is passed from generation to generation just by chewing the fat, telling war stories, things of that nature. I think most people just hold that information in their head, and then it becomes tacit knowledge into that generation.

P3 The primary focus is we share locations of data on our own server. We constantly go to meetings together. If one attends the meeting then, the other will provide notes to bring them up to speed on the information that was shared. Emails are always shared.
That information is verbally passed on as to what's happened in the past 2 weeks, what we expect is upcoming in the next 2 weeks, and then we are very cognizant about providing other type of peripheral information

> that comes in and pushing it out to all of our peers, but also pushing information down to our subordinates, to empower them and also to give them information as to what our plans are here, what you can expect.

One participant described a delay in receiving critical information in a timely manner, and could not forget the consequences of that situation. “People hated being blind-sided and so I think that by pushing information down, we're able to empower them” (P5). Transformational leadership was evident when empowering leaders influenced followers’ work engagement (Breevaart, Bakker, Hetland, Demerouti, Olsen & Espevik, 2013). The relationship between transformational leadership and work engagement in governmental hospital nurses showed transformational leadership was related to follower work engagement, particularly when the follower was creative, innovative, and proactive (Hayati, Charkhabi, & Naami, 2014). Hayati et al. (2014) illustrated that transformational leaders conveyed their enthusiasm and inspiration to their subordinates by the way of modeling. Researchers exploring leadership focused on the organizational outcomes of a specific leadership style, such as implementation and competence. This participants demonstrated that daily variations in transformational leadership may also influence employees’ work experiences. Personnel became more engaged in their work, when their supervisor was able to enhance their optimism through their transformational leadership style. “I think that we try really hard to mentor. We try to place senior staff with new staff from the time that they come into the organization they're assigned a mentor” (P1). “We constantly go to meetings together. If one attends the meeting then, the other will provide notes to bring them up to speed on the information that was shared. Emails are always shared" (P3). These results implied that individual resources and work engagement may be critical in explaining the transformational leadership performance link, considering the positive link between work engagement and performance (Hayati et al., 2014).

Theme 2: Generational Differences

The second theme included the participants' perception of generational differences within the organization. "There was value and benefit to the work that was done every day, regardless of the generation, and people are proud of that" (P1). Participants described baby boomers as being: (a) team oriented, (b) wanting to make a difference, (c) optimistic, (d) questioned everything, and (e) wanted to be involved. Younger employees were referred to as: (a) having high job expectations, (b) being independent, (c) skeptical, and (d) informal. Knowledge management is a process through which organizations generate value from intellectual and knowledge-based assets (Williams & Schaefer, 2013). Leaders generating value from assets included organizing what employees knew, and sharing that information among employees and departments in an effort to develop best practices (Williams & Schaefer, 2013).

Sixty-seven percent (4/6) of the participants agreed that the exodus of baby boomers was problematic. "There was value to tacit knowledge and sharing knowledge must always be encouraged" (P1). The participants recognized the different generations within the organization, and the challenges of incorporating all values systems. "This baby boomer may hold on to their value system, and if they are not management, they do not have the ability to change things the way they would like" (P4). One participant stated age and experience of the employees had an influence on value systems. Younger employees demonstrated interest in what was in it for them, and how a career position benefited them for the short-term. Baby boomer employees demonstrated loyalty and dedication to their positions, and were often heard making comments about how they wished the younger employees had a better value system, and more respect for their leaders and the organization. Two participants acknowledged developing an understanding of the different generations in the workforce and were optimistic that the generational differences were manageable with a shared vision, and open and honest communication throughout the agency. Thirty-three percent (2/6) of participants agreed generational differences was instrumental in sharing tacit knowledge. The participants supporting statements are listed in Table 2.

Table 2

Table 2 Theme 2. Generational Differences

Participant	Participant Comment
P1	I'm balancing Generation Y, which studies say they're only going to be around for 1 to 2 years. Even if I have a vested member that I try to share and develop with a mentoring program that baby boomer and that institutional knowledge is going to be lost. … there is tremendous value because you're trying to demonstrate how that generation relates to work The baby boomer's work ethic is valued because they have experience that may help us get through the crisis quicker. Most of the time younger employees seem to be somewhat self-serving. …they do more to try to memorialize the reasoning behind the action vs. just what the action was A lot of our employees that are of the baby boomer generation would give the appearance that their job is to do as they're instructed, and it's not to make waves.

One participant stated “The baby boomer’s work ethic is valued because they have experience that may help us get through the crisis quicker” (P4). “I have a lot of people with institutional knowledge, that’s how we refer to it in our organization over the years, and as I lose those people, that institutional knowledge is going to be lost because even when I can share it, it's not going to remain” (P1). One participant referred to an artifact, and showed me the names and pictures of the individuals on the document, and shared with me how those individuals’ specific skill sets were not replaceable when they left the agency. “Some of the more senior individuals in the agency have experiences and different philosophies about how to motivate and gather information, or how to give direction about how to do something that the new generation does not yet understand” (P4).

The participants described the countless ways they shared knowledge through artifacts, mentoring, meetings, telling war stories, and sharing emails. Leaders cannot force knowledge into an orderly form and consider disseminating knowledge as best practices (North & Kumta, 2014). In unpredictable and varied environments such as government agencies, unexpected crisis situations demand quick and collective learning as well as living with mistakes (North & Kumta, 2014). There are differences in the method in which government agents share tacit knowledge in a stable or turbulent context. Leaders sharing knowledge in a government organization are building knowledge management in turbulent contexts and should: (a) codify knowledge and document processes, (b) share tacit knowledge, (c) develop the ability to learn fast and turbo problem-solve, (d) develop next practices, and (e) and facilitate ad-hoc availability of knowledge (North & Kumta, 2014).

Theme 3: Lack of Structured Systems

The third theme included the participants' perception that structured systems to retain tacit knowledge were lacking. "We do not have a good structure for trying to extract knowledge from them in a formalized manner since a lot of the time that knowledge is beneath the surface but they are not offering it up, it has to be drawn out" (P4). One participant stated, "I think that we are losing a huge amount of knowledge in transfers and retirements, and one of my biggest jobs is training replacements" (P5). Further, 100% (6/6) of the participants agreed that there was a lack of structured systems to retain tacit knowledge from baby boomers. The participants supporting statements are listed in Table 3.

Table 3

Table 3 Theme 3. Lack of Structured Systems

Participant	Participant Comment
P1	And as I lose those people that institutional knowledge is going to be lost because even when I can share it, it's not going to remain… In an effort to capture that is trying to improve our documentation of their training and experiences and organizational plans, response plans, tentative challenges, operationally experiences The only problem is that's only retained by very few at the top, not really funneled down to people who need the work knowledge…

P2	The staff has experience in different philosophies in how to motivate or abstract information or how to give direction on how to do something that the new generation does not yet understand. But many instances the information is passed verbally from the experience component of the senior employee back to the new employee which there is no way you can put in a book So you're trying to back and think of what experience you've had from those people in those conversations or past events that lead to your retention of that information
P3	A lot of knowledge is walking out the door that the younger officers just don't have. I don’t think that you can ever truly get all the intelligence and knowledge levels out
P4	A lot of the institutional knowledge will leave with the baby boomers. We don't really have a good formalized structure for removing that knowledge from baby boomers and institutionalizing it.
P5	This was a planned way of responding to something, but nobody in the organization knows what it was because the people that set it up are already gone
P6	I am sure that there is a loss… Some I think have been passed on to them over time, but I don’t think that you can ever truly get all the intelligence and knowledge levels out of these older employees that are departing to get the younger employee. I can teach it by seeing it and that's kind of what we try to do the best we can.

Participants cited the type of job they had may influence the manner in which they passed on tacit knowledge. “We try to improve our documentation and operational experiences, and will usually end up eliciting the information that is residing in their head” (P5). One participant mentioned the dependence they have on each other to share knowledge and that they relied on each other for current meeting statuses, and to be copied on memos or emails they may not have access to because of time restraints. One systems theory proposal relating to the study of the government organization was holism. The whole was not something additional to the parts; it was the parts in a specific structural arrangement, and with common activities that constituted a whole (Adams, Hester, Bradley, Meyers, & Keating, 2014). The arrangement and events differed in character according to the stage of development of the whole. The whole was an exclusive structure of parts with appropriate activities and functions.

One participant described challenges in organizing and facilitating tacit knowledge, and how difficult the task was without help from others. Satisficing was another systems proposition identified and described as one chooses an option, satisficing, is perhaps not the best, but good enough (Adams et al., 2014). One participant explained, “I don’t know that we actually store anything. I think it goes back to the initial discussion about mentoring, working with each other, and teaching while you are here” (P2). Leaders agreed developing a structured system to retain tacit knowledge may be helpful, and that the process they maintained could be better, but may be good enough.

Research Question

The central research question that guided the data collection and data analysis for this research focused on perspectives of leaders’ strategies used to retain tacit knowledge from baby boomers. Leaders may develop strategies from the findings to retain tacit knowledge from retiring baby boomers. This question was: What strategies do local government leaders need to retain tacit knowledge from retiring baby boomers? I answered the central research question through 11 interview questions answered by six participants and supporting documentation and artifacts.

I did not include participant comments from question number one, or question number two because 100% of the participants voiced concern that exiting baby boomers might be problematic to their organizations, and 100% of the participants stated they were unclear if any strategies existed to capture and retain tacit knowledge. Question 11 focused on any additional information participants might be able to share with me, and all participants repeated what they had already shared with me. There was no new information and data saturation was achieved. The participants' responses in interview questions three through 10, as annotated in Appendix E, provided depth and conformity toward leader strategies to retain tacit knowledge in retiring baby boomers. The participants answered interview questions (see Appendix C) and three themes emerged which helped answer the central research question. The three themes from the participants' response included: (a) mentoring, (b) generational differences, and (c) lack of structured systems.

In the following sub-section, I describe participant responses in interview questions 3-10, which provided data to answer the central research question. The participants' responses to the interview questions helped enhance the study by providing perspective and rich data to answer the research question.

Interview Question 3: What is your experience retaining tacit knowledge from a person reporting to you?

Fifty percent (3/6) of the participants identified tacit knowledge as important but had not determined a method to retain tacit knowledge from employees reporting to them. One participant described how they were mentored as a new employee, and that was the way they planned to share their tacit knowledge (P1). One participant mentioned seeking out individuals with institutional knowledge, and in a time of crisis, approached them for assistance to make decisions (P1). Leaders provided significant contributions to the daily operations of government, and leaders needed strategies to sustain consistent performance throughout the organization when baby boomers retired (Pollack, 2012). Succession planning was adopting proactive strategies to staff the organization with qualified individuals for the purpose of retaining knowledge (Aaron & Watson, 2010).

The raw data from the participants are depicted in Appendix E. Fifty percent (3/6) of the participants stated they identified, developed, and shared tacit knowledge through documentation, discovered the information in a database and shared its location with peers, or communicated knowledge from meetings that was not written down, rather discussed during an incident briefing, or from discussing similar incidents. Leaders acquired embodied learning by mimicry and skills training. The best knowledge transfer emerged when compatible dialog existed, and the owner of the tacit knowledge and other individuals came from a similar frame of reference (Bennet & Bennet, 2011). In conclusion, the participants primarily mentioned they had not determined a method to retain tacit knowledge from a person reporting to them, and were passing on documentation and locations of knowledge within internal knowledge management systems.

Interview Question 4: What obstacles, if any, obstruct your attempts to retain tacit knowledge of baby boomers?

In an organization when knowledge is of intentional value, and distributed across different individuals who held that knowledge in tacit form, leadership assumed a distributed form, and each of the knowledge-holders were independent sources of leadership influence (Merat & Bo, 2013). On the contrary, in an organization where knowledge was highly codified, leadership took a centralized form; this was because knowledge in explicit or codified form was highly mobile through vertical structures and easily integrated in the hands of a single individual allowing them to carry out leadership functions without a need to rely on other members (Merat & Bo, 2013). Thirty three percent (2/6) of the participants mentioned baby boomers and their perceived status in the workplace was an obstacle to retaining tacit knowledge. “A lot of our employees that are of the baby boomer generation would give the appearance that their job is to do as they are instructed” (P4).

Baby boomers did not make a practice of volunteering information as stated by one participant. “That knowledge is there beneath the surface but they are not offering it up. It has to be drawn out of them” (P2). When high-level decision-makers depend on tacit knowledge held by lower-level employees, centralized command becomes irrelevant (Merat & Bo, 2013). The main barrier to acquiring and formalizing that knowledge was its tacit nature because knowledge comes from experience and project work. To share tacit knowledge within the organization, individuals need to collaborate to make the knowledge explicit enabling for ease of dissemination. (Heredia, Garcia-Guzman, Amescua, & Sanchez-Segura, 2013).

Interview Question 5: How, if at all, are you addressing these obstacles?

Three participants mentioned training, and asking questions, are how they were addressing obstacles to retaining tacit knowledge from baby boomers. Participants two, three, and four (50% of the participants) asked questions, and trained replacements to maintain the tacit knowledge in the organization. “Training replacements is how we're going to be able to get through the departure of our senior people and carry forward some of the previous ways of how things are operated” (P6). “We are trying to sit down and ask questions, and to get the report system up, and find more time to read it” (P2).

Leaders shared knowledge throughout the organization by mentoring and telling stories. Tacit knowledge was clearly indirect, and the interpretation of it along with its transfer required multiple stakeholders (Venkitachalam & Busch, 2012). Individual knowledge primarily included tacit knowledge that was not naturally expressed, or codified. This type of procedural knowledge becomes a form of applied intelligence to the organization. Organizational knowledge was both tacit and explicit, and developed from that which existed in the employees’ minds and their dealings in the workplace (Venkitachalam & Busch, 2012).

In conclusion, 50% (3/6) of the participants mentioned asking questions during round table discussions, and maintaining communications by training replacement personnel, was how they were addressing obstacles that obstructed attempts to retain tacit knowledge from baby boomers. One participant also mentioned a critical problem was the revolving door of employees coming and going based on the type of generation they were hiring as employees. Surprisingly, only seventeen percent (1/6) of the participants stated getting the report system up, and finding more time to read the report was also an obstacle that obstructed attempts to retain tacit knowledge.

Interview Question 6: What tacit knowledge strategies will you share with colleagues before you retire?

Fifty percent (3/6) of the participants experienced difficulty expressing a pre-determined strategy for sharing tacit knowledge with colleagues before they retired. “I have to figure out how to get the information and knowledge that I have in an explainable way to where someone could retain it” (P3). Another participant explained, “I have to figure out the things that I have in place and figure out the people I have” (P4). Bringing the knowledge back from the past and trying to pass it on was a common method for sharing tacit knowledge before retiring. Determining a strategy for the remaining employees to retain tacit knowledge was a challenge yet to be identified by the participants.

The participants discussed a collective purpose to share tacit knowledge and worked to determine strategies to pass on that knowledge to colleagues. The best way to share tacit knowledge was through small teams of five to seven members working together on group projects, and accepting each other through a common language and purpose (Anand et al., 2010). Individuals form shared knowledge when an individual provides intellectual stimuli to another individual who provided an intellectual response as a consequence (Horaguchi, 2014).

Parts of organizational tacit knowledge were more difficult to identify, access, or express in explicit terms. Tacit knowledge is attached to people and inherently more difficult to share and transfer (Dinur, 2011). One participant mentioned how explicit knowledge was articulated, written down and identified with much less effort than tacit knowledge.

Question 7: What tacit information within the workplace holds value?

Leaders formed valuable tacit knowledge at three levels: (a) individual, (b) team, and (c) organizational. Each of the three instances evolved separately enabling individual and team learning, and as they used the same organizational knowledge they shared experiences (Heredia et al., 2013). “I think it depends on the division in which you work, and the assignment in which you are assigned, the tacit knowledge that you are going to have and retain over the years is going to be different” (P3). “You are going to learn something new every day no matter how long you have been in the profession” (P4).

Thirty-three percent (2/6) of the participants expressed there was a sizeable amount of tacit knowledge that held value in the workplace, and there was so much information it was difficult to determine what held value (P2, P6). Tacit knowledge contained in informal learning environments was difficult to discover and manage, and when identified, challenging to reuse in practice (Heredia et al., 2013). Participants used socialization to share tacit knowledge among each other, and modified explicit knowledge into tacit knowledge. Polanyi stated we can know more than we can tell, and tacit knowledge was personal, and based on experience (Polanyi, 1967).

In conclusion, 100% (6/6) of the participants agreed that there was tacit knowledge that held value, and so much it was difficult to quantify. One participant stated value was based on the person that does not have the information (P5). “The things that you do not see pop up every day, and instead every 5, 10, or 15 years, those things in particular are very valuable” (P4).

Question 8: How do you determine what tacit knowledge holds a specific value?

Fifty percent (3/6) of the participants could not articulate what tacit knowledge holds a specific value. “ I don’t know to be honest with you, I can’t say that I’ve delved that deeply into it,” and “not sure” were the responses to this interview question (P2, P6, P5). Tacit knowledge emerged as the know-how as opposed to the know-what (Polanyi, 1967). Tacit knowledge can be explained as learning a skill, but not in a way that can be written down. Tacit knowledge consisted of habits that we do not always recognize in ourselves. The process of transforming tacit knowledge into explicit knowledge appears as codification or specification. The tacit aspects of knowledge are those that individuals cannot codify, and can only be transmitted by training or gained through personal experience (Polanyi, 1967).

A top-down process by determining only the knowledge they need to know stifles creatively, and inquiry and innovation discovery (Polanyi, 1967). A participant mentioned the manner in which they determined what tacit knowledge held value was division specific (P3). Another participant mentioned, “I think that’s just based on the situation you’re facing”(P4). And last, one participant mentioned “You may have this baby boomer's perspective, or even a group of baby boomer employees that have that perspective, and then you have to evaluate, does this still hold water today in this environment" (P1).

Question 9: What methods, if any, does your organization use to store and retain tacit knowledge retrieved from exiting baby boomers?

Sixty-seven percent (4/6) of the participants mentioned working with each other in a reciprocal manner, and story telling improved the capacity to store and retain tacit knowledge from baby boomers. "I think a lot of the tacit knowledge is passed from generation to generation just by telling war stories" (P4). Researchers regarded reciprocity as a value of knowledge-sharing and creating organizational memory (Lin et al., 2012). Understanding the value of human capital and the resulting loss of knowledge encouraged leaders to retain and transfer tacit knowledge. Leaders maintain expertise to ensure a smooth succession for future leaders. Social interaction of leaders contributed to an integration of knowledge, providing organizational members opportunities to exchange and incorporate each other's knowledge. Leaders use social ties to increase the likelihood of locating knowledge in an expedited manner (Maurer et al., 2011).

One participant mentioned limited time and resources to develop a system to retain tacit knowledge. The leaders of small and medium sized organizations typically had no formal knowledge management systems because of limited resources, creating additional challenges for leaders of smaller organizations (Supyuenyong & Swierczek, 2011). Thirty-three percent (2/6) of the participants were not actively storing tacit knowledge. One participant mentioned, "I don't know that we actually store anything" (P2). Another participant mentioned, "I have no organizations setup or way to capture that information” (P3). “ I think most people just hold that information in their head, and then it becomes tacit knowledge for that generation” (P5). Government workers shared tacit knowledge with others when tacit knowledge became explicit. Members of organizational units transferred knowledge when members shared a similar frame of reference, and facilitated the use of existing knowledge resources. Leaders with common ties presented opportunities for knowledge transfer and served as channels for information exchange (Maurer et al., 2011).

Question 10: How do personnel share tacit knowledge in your organization?

Fifty percent (3/6) of the participants mentioned mentoring, telling stories, and meetings were the methods tacit knowledge developed in their organization. “The supervisors go to their shift assignments and they take that information and pass it down to their subordinates” (P3). “We solicit information from our employees and use mentoring programs. Anybody is capable of asking anybody a question, and that question at times is here is the problem, how did we use to do this” (P2). Another participant mentioned personnel share tacit knowledge “primarily through war stories” (P1). Thirty-three percent (2/6) of the participants mentioned personnel share tacit knowledge “one-on-one during regular meetings and in frequent emails” (P4, P5).

One method to support knowledge-sharing involved depicting a culture of candidness and passion for sharing on all levels, from upper administration to individual employees, as well as between individual workers. Leaders shared tacit knowledge and expertise in small groups providing an environment for questions, dialog, and information exchange. Leaders created an environment conducive to the creation and contribution of tacit knowledge and encouraged open communication among knowledge workers (Bennet & Bennet, 2011). Leaders are inspiring older workers to share experiences created value for the team along with higher levels of performance (Streb & Gellert, 2011). Leaders must ensure the smooth transfer of knowledge to maintain continuity for providing services and products (Aaron & Watson, 2010).

Question 11: What additional information can you provide to help me understand how your organization gathers and retains tacit knowledge?

Eighty-three percent (5/6) of the participants mentioned mentoring, and relationships proved necessary in attempts to gather and retain tacit knowledge in their organization. “The culture that we’ve really tried to develop here has been more mentoring. I try to use those people that have the stories and the institutional knowledge, and this is why we've done this, and this is where this came from, this is why it's important. Anytime you can explain that to somebody it usually improves that understanding of what our goals are as an organization” (P1). Another participant mentioned, “When tragedy strikes we find a person that can best help us knowledge-wise to get through it” (P2). Leaders sharing personal experiences provided additional opportunities for knowledge than participating in class training (Thomas & Kamalanabhan, 2012). One participant mentioned, “we just talk, and we communicate with each other, and ensure that everybody else is aware of projects that are going on” (P5). Another participant mentioned “It’s the relationships that we are building and the communications that we can have with each other toward a common goal, and it’s not adversarial” (P6).

Leaders sharing personal experiences provided additional opportunities for knowledge than participating in class training (Thomas & Kamalanabhan, 2012). Mentors assist protégés' work through the consequence of decisions and referred protégés to others when the mentor's knowledge is lacking. Mentors benefit from the mentor role by improving skills, preserving organizational talent, and create legacies affecting the profession. Mentors act as a teacher, facilitator, and networker (Huskins et al., 2011).

Tacit knowledge developed when organizations cooperated, and the members communicated (Tounkara, 2013). Members communicated by: (a) formal visits, (b) interviews, and (c) communication. More routines were needed to interpret tacit knowledge as it must be absorbed and understood by the receiver. Communication processes and information flows propelled the transfer of knowledge. Personal channels were more effective for distributing highly contextual knowledge whereas impersonal channels were most effective for knowledge than can be readily codified and generalized to another context (Tounkara, 2013).

Applications to Professional Practice

Retaining tacit knowledge proved fundemental to an organization's success. The study added to the body of knowledge regarding strategies to retain tacit knowledge from baby boomers by identifying three themes including: (a) mentoring, (b) generational differences, and (c) lack of structured processes. The significance of the study may present findings for business leaders to implement changes within their organizations including other government organizations. The study also added to the body of knowledge by creating an awareness of generational teams in the workplace. Leaders struggled with how to harness and transfer the human capital of baby boomers to less experienced generations (Pollack, 2012). Leaders, who retained tacit knowledge from baby boomers, and trained younger employees to assume future leadership roles, captured, and preserved, valuable insight, and experience.

The results of this study may assist leaders to identify strategies to retain tacit knowledge because of a loss in human capital as baby boomers retired from the workforce. Leaders leveraging senior workers' experiences create value for the team, along with higher levels of performance (Streb & Gellert, 2011). The results of this study might inform policy, by introducing successful strategies for retaining tacit knowledge, and raise awareness on loss of work experience. Business leaders may benefit from the strategies, identified in this study, to retain tacit knowledge from baby boomers. The findings may benefit retiring workers and the new workers’ families by training older workers to share tacit knowledge with new workers, and incorporating strategies to mentor new workers replacing the older workforce. Leaders who apply the doctoral study to professional practice may develop a strong group of managers, and subject matter experts, to further the commitment of knowledge sharing.

Implications for Social Change

The ability to build and retain successful teams is the key to any leader’s success. The speed of globalization has never been faster, and the imbalance of age between old and young has never been so dramatic. In many organizations, especially those based in developed markets, half of senior leaders will be eligible for retirement by 2016, and half of them do not have a successor ready or able to fill the vacant position (Fernandez-Araoz, 2014).

A lack of business continuity and tacit knowledge is lost forever without strategies to retain tacit knowledge from baby boomers leaving the workforce. The results from this study could promote positive social change within any organization, and create awareness to leaders by determining strategies to retain tacit knowledge. An additional outcome of the research may be innovative methods for recruiting, and hiring employees focusing on the human capital and potential of each generation.

Identifying strategies to retain knowledge, and the reasons why leaders lack structured methods to retain tacit knowledge from retiring baby boomers can assist other leaders in: (a) implementing strategies (b) improving mentoring programs, (c) understanding generational strengths and developmental opportunities in the workplace, and (d) developing a formalized structure to capture and retain tacit knowledge. The three themes that emerged in this study as a result of the data analysis were: (a) mentoring, (b) generational differences, and (c) lack of structured systems. I aligned the results of the study with prevailing research conducted by previous researchers. Succession planning is essential to remain competitive because the oldest of the baby boomer generation turn 65 years old in 2012 (Appelbaum et al., 2012). Leaders predict a generational phenomenon to create a significant effect on recruitment, succession planning, skill transfer, and knowledge-sharing (Joshi et al., 2011). Managers must strategize how to communicate tacit knowledge, and protect assets to ensure sustainability (McDonnell et al., 2010).

Leaders implementing cross-generational mentoring improve organizational knowledge (Gratton, 2011).

Recommendations for Action

Significant issues affect organizations without strategies to retain tacit knowledge from retiring baby boomers. Leaders must understand how to improve methods to retain tacit knowledge (Bloomberg & Volpe, 2012; Gorman, 2010; Hau et al., 2013; Joy & Haynes, 2011). The study results will apply to government organizations, private sector businesses, and nonprofit organizations, and may create an awareness of the need for strategies to retain tacit knowledge from baby boomers.

Leaders use mentoring and telling stories more than any other methods to retain tacit knowledge from retiring baby boomers. I recommend that organizations use the outcomes to assist their efforts to retain tacit knowledge. Leaders will not succeed in accumulating knowledge without identifying a relationship of collective memory and the relationship between mentoring and knowledge transfer (Fleig-Palmer & Schoorman, 2011). Organizational leaders should create formal mentoring programs to define goals, share ideas, and be open for continuous feedback from mentors (Craig et al., 2012). Aging baby boomers want to do meaningful work, mentor others, learn new technical skills and use the experience to produce purposeful work (Gursoy et al., 2013). Mentors help trainees work through the consequence of decisions and refer trainees to others when the mentor's knowledge is lacking. Mentors benefit from the mentor role by enhancing skills, retaining organizational talent and creating legacies affecting the profession. Mentors act as a coach, facilitator, and networker (Huskins et al., 2011). I plan on disseminating the results and distributing the findings to government research journals and publications. Consulting and training organizations interested in assisting companies retain tacit knowledge from retiring baby boomers can also use the results of the study.

Recommendations for Further Research

I conducted a qualitative case study to explore strategies needed by local government leaders to retain tacit knowledge from retiring baby boomers. I studied how leaders strategized to retain tacit knowledge embedded in the human capital of aging baby boomers before the baby boomers retired. I identified common themes among participant experiences and perceptions. A qualitative case study was preferred for this research because I was investigating leaders' perceptions and experiences.

Quantitative research is a method to investigate relationships, cause-effect phenomenon, and conditions (Bloomberg & Volpe, 2012). In addition to generational differences impacting strategies to retain tacit knowledge, further quantitative research concerning the potential, and motivation of employees could expand the body of knowledge, and add to the depth and breadth of the research. I interviewed a small sample and review documentation and artifacts reflecting succession-planning initiatives. The small sample size of six participants limited the transferability of results (Yin, 2014). Using a larger sample size, coupled with quantitative research, would be helpful to determine the relationship between two or more constructs.

Based on the findings of the research, recommendations for further study regarding retaining tacit knowledge from baby boomers would add to the existing literature on knowledge management. Recommendations offered in this doctoral study may provide leaders with awareness and a better understanding of the importance of retaining and sharing tacit knowledge. The findings from this doctoral study could assist organizational leaders of small and large government or private businesses, in their efforts to develop a succession plan.

Reflections

The purpose of the research was to explore what strategies six local government leaders from the Midwest United States used to retain tacit knowledge of baby boomer employees. The participants were enthusiastic about the opportunity to share their experience and perceptions. I collected information on the business problem from leaders with distinct perceptions. Open-ended questions were used during the interview process. During the interviews, I recognized how passionate each participant was about what they did every day when they came to work. The participants were dedicated and proud to serve in each of their diverse capacities. Each of the participants proudly articulated their achievements and goals to improve the continuity of business practices. Some of the participants were concerned about how the generational gaps could affect the organization, and were planning to spend time with their teams to discuss plans to incorporate knowledge sharing practices with each generation. The study reminded me that outstanding individuals are working tirelessly every day to create a better world, and I was happy to have experienced that observation from these devoted individuals.

Summary and Study Conclusions

Approximately 11,000 baby boomers turn 50 every day and will vacate 152 million positions by 2030 (Meriac et al., 2010). An estimated 20% of the 150.9 million jobs in the United States require replenishing because of baby boomers exiting the workforce (U. S. Bureau of Labor Statistics, 2012). The global workforce is aging, and leaders face challenges to recruit the right people with appropriate skills (Shacklock & Brunetto, 2011). Organizational leaders need an understanding of how to increase knowledge-sharing (Hau et al., 2013). Implementing knowledge sharing processes may produce substantial benefits throughout government and non-government entities (Connell, 2013).

The purpose of this study was to explore what strategies local government leaders use to retain tacit knowledge of baby boomer employees. Baby boomers, eligible to retire, remain important to the organization, similar to high-quality new recruits (Cho & Lewis, 2012). In this study, I used a qualitative case study with purposeful selection to understand the perspectives and experiences of government leaders in the Midwest United States. The central research question was: What strategies do local government leaders need to retain tacit knowledge from retiring baby boomers?

Retaining tacit knowledge is important to supporting government agencies. Leaders struggle with how to harness and transfer the human capital of baby boomers to less experienced generations (Pollack, 2012). The findings from the study concluded mentoring, generational differences, and a lack of structured systems were significant factors in retaining tacit knowledge. Transformational leaders can encourage employees to stay with the organization by showing individualized attention and developing strong personal relationships with their employees. Transformational leaders are successful by engaging subordinates in shared exchange processes based on interpersonal trust, common loyalty, and long-term reciprocity with supervisors (Tse et al., 2013). Decision makers can use the findings to: (a) invest in programs to retain institutional knowledge, (b) recruit the necessary talent and change existing programs and policies to test the development of new approaches to manage the transition of an older workforce, and (c) become innovators for the upcoming generations regarding workplace flexibility. The knowledge from baby boomers could continue to shape the workforce for generation Y and generation X. The legacy of the baby boomer cohort could be one of innovation in the workplace and transform expectations for future generations. I recommend that future researchers investigate other topics that surfaced; such as time management techniques to assist leaders in managing the process of retaining tacit knowledge.

References

Aaron, K. A., & Watson, D. J. (2010). Bringing the university to city hall: The master of public affairs in city hall. *Journal of Public Affairs Education*, *16,* 475-485. Retrieved from http://www.naspaa.org/initiatives/jpae/jpae.asp

Abdullah, M., & Eng, T. (2012). Perceived communication skills of persons with sensory impairment: A comparison by employment status. *Procedia – Social and Behavioral Sciences, 31,* 794-799. doi:10.1016/j.sbspro.2011.12.143

Adams, K. M., Hester, P. T., Bradley, J. M., Meyers T. J., & Keating, C. B. (2014). Systems theory as the foundation for understanding systems. *Systems Engineering, 17*, 112-123. doi:101002/sys.21255

Alasuutari, P. (2010). The rise and relevance of qualitative research. *International Journal of Social Research Methodology*, *13,* 139-155. doi:10.1080/13645570902966056

Allen, D. G., Bryant, P. C., & Vardaman, J. M. (2010). Retaining talent: Replacing misconceptions with evidence-based strategies. *Academy of Management Perspectives*, *24*, 48-64. doi:10.5465/AMP.2010.51827775

Alsayed, A. K., Motaghi, M. H., & Osman, I. B. (2012). The use of multifactor leadership questionnaire and communication satisfaction questionnaire in Palestine: A research note. *International Journal of Scientific and Research Publications, 2*, 1-9. Retrieved from http://www.ijsrp.org

Anand, G., Ward, P. T., & Tatikonda, M. V. (2010). Role of explicit and tacit knowledge in six sigma projects: An empirical examination of differential project success.

Journal of Operations Management, 28, 303-315. doi:10.1016/j.jom.2009.10.003

Andreeva, T., & Kianto, A. (2012). Does knowledge management really matter? Linking knowledge management practices, competitiveness and economic performance. *Journal of Knowledge Management, 16*, 617-636. doi:10.1108/13673271211246185

Andrews, R., & Boyne, G. A. (2010). Capacity, leadership, and organizational performance: Testing the black box model of public management. *Public Administration Review, 70*, 443-454. doi:10.1111/j.1540-6210.2010.02158.x

Appelbaum, S. H., Gunkel, H., Benyo, C., Ramadan, S., Sakkal, F., & Wolff, D. (2012). Transferring corporate knowledge via succession planning: Analysis and solutions part 1. *Industrial and Commercial Training*, *44*, 281-289. doi:10.1108/00197851211245031

Avolio, B. J., & Berson, Y. (2004). Transformational leadership and the dissemination of organizational goals: A case study of a telecommunications firm. *The Leadership Quarterly, 15*, 625-646. doi:10.1016/j.leaqua.2004.07.003

Ballinger, G. A., Lehman, D. W., & Schoorman, F. D. (2010). Leader member exchange and turnover before and after succession events. *Organizational Behavior and Human Decision Processes, 113*, 25-36. doi:10.1016/j.obhdp.2010.04.003

Bansal, P., & Corley, K. (2012). Publishing in AMJ-part 7: What's different about qualitative research? *Academy of Management Journal, 55*, 509-513. doi:10.5465/amj.2012.4003

Barron, J. M., Chulkov, D. V., & Waddell, G. R. (2011). Top management team turnover, CEO succession type, and strategic change. *Journal of Business Research*, *64*, 904-910. doi:10.1016/j.busres.2010.09.004

Bass, B. M., & Bass, R. (2008). *The Bass handbook of leadership: Theory, research, and managerial applications*. New York, NY: Free Press.

Bennet, D., & Bennet, A. (2011). Social learning from the inside out: The creation and sharing of knowledge from the mind/brain perspective. In J. Girard, & J. Girard (Eds.), *Social Knowledge: Using social media to know what you know* (pp. 1-23). Hershey, PA: Information Science Reference. doi:10.4018/978-1-60960-203-1.ch001

Berta, W., & Laporte, A. (2010). Unpacking the relationship between operational efficiency and quality of care in Ontario long-term care homes. *Canadian Journal on Aging / La Revue canadienne du vieillissement, 29*, 543-556. doi:10.1017/S0714980810000553

Bloomberg, L. D., & Volpe, M. (2012). *Completing your qualitative dissertation: A roadmap from beginning to end*. Thousand Oaks, CA: Sage.

Boyne, G. A., James, O., John, P., & Petrovsky, N. (2011). Leadership succession and organizational success: When do new chief executives make a difference? *Public Money & Management*, *31*, 339-346. doi:10.1080/09540962.2011.598345

Brack, J. (2012). *Rethinking generation gaps in the workplace: Focus on shared values*. UNC Kenan-Flagler Business School. Retrieved from http://www.kenan-flagler.unc.edu/executive-development/custom-programs/~/media/C8FC09AEF03743BE91112418FEE286D0.ashx

Breevaart, K., Bakker, A., Hetland, J., Demerouti, E., Olsen, O. K., & Espevik, R. (2013). Daily transactional and transformational leadership and daily employee engagement. *Journal of Occupational and Organizational Psychology, 87*, 138-157. doi:10.1111/joop.12041

Bright, M. A., & O'Conner, D. (2007). Qualitative data analysis: Comparison between traditional and computerized text analysis. Retrieved from http://digitalcommons.unf.edu/ojii_volumes/21

Bureau of Labor Statistics, U.S. Department of Labor, *Occupational Outlook Handbook, 2012-13 Edition, Librarians*. Retrieved from http:www.bls.gov/ooh/education-training-and-library/librarians.htm

Burns, J. M. (1978). *Leadership*. New York, NY: Harper and Row.

Butler, A. C. (2010). Repeated testing produces superior transfer of learning relative to repeated studying. *Journal of Experimental Psychology. Learning, Memory & Cognition*, *36*, 1118-1133. doi:10.1037/a0019902

Campion, M. A., Guerrero, L., & Posthuma, R. (2011). Reasonable human resource practices for making employee downsizing decisions. *Organizational Dynamics*, *40*, 174-180. doi:10.1016/j.orgdyn.2011.04.004

Cappelli, P. (2011). HR sourcing decisions and risk management. *Organizational Dynamic*s, *40*, 310-316. doi:10.1016/j.orgdyn.2011.07.008

Cavazotte, F., Moreno, V., & Hickmann, M. (2012). Effects of leader intelligence, personality and emotional intelligence on transformational leadership and managerial performance. *The Leadership Quarterly, 23*(3), 443-455.

doi:10.1016/j.leaqua.2011.10.003

Cho, Y. J., & Lewis, G. B. (2012). Turnover intention and turnover behavior: Implications for retaining federal employees. *Review of Public Personnel Administration, 32*, 4-23. doi:10.1177/0734371X11408701

Christy, J. T. (2011, March). Successful leadership transition. *Training & Development Magazine*, 56-60. Retrieved from http://www.astd.org/Publications/Magazines/TD

Clauson, M., Wejr, P., Frost, L., McRae, C., & Straight, H. (2011). Legacy mentor: Translating the wisdom of our senior nurses. *Nurse Education in Practice, 11*(2), 11-14. doi:10.1016/j.nepr.2010.10.001

Connell, M. A. (2013). *Exploring knowledge sharing in the department of defense* (Doctoral dissertation). Available from ProQuest Dissertations and Theses database. (UMI No. 3557132)

Craig, C. A., Allen, M. W., Reid, M. F., Riemenschneider, C. K., & Armstrong, D. J. (2012). The impact of career mentoring and psychosocial mentoring on affective organizational commitment, job involvement, and turnover intention. *Administration & Society, 45*(7), 35-47. doi:10.1177/0095399712451885

Croteau, J. D., & Wolk, H. G. (2010). Defining advancement career paths and succession plans: Critical human capital retention strategies for high-performing advancement divisions. *International Journal of Educational Advancement*, 10, 59-70. doi:10.1057/ijea.2010.6

Daghfous, A., Belkhodja, O., & Angell, L. C. (2013). Understanding and managing knowledge loss. *Journal of Knowledge Management, 17*, 639-660. doi:10.1108/JKM-12-2012-0394

Denzin, N. K. (2009). *The research act: A theoretical introduction to sociological methods.* (4th ed.). New Brunswick, NJ: Aldine Transaction.

Dinur, A. (2011). Tacit knowledge taxonomy and transfer: Case-based research. *Journal of Behavioral and Applied Management*, *12*, 246-281. Retrieved from http://www.ibam.com/jbam.html

Doherty, J. (2013, April). On the rise. *Barron's*. Retrived from http://online.barrons.com/articles/SB50001424052748703889404578440972842742076

Drucker, P. F. (1999). Knowledge-worker productivity: The biggest challenge. *California Management Review, 41*(2), 79-94. Retrieved from http://cmr.berkeley.edu/

Emelo, R. (2010). Increasing productivity with social learning. *Industrial and Commercial Training, 42*, 203-210. doi:10.1108/00197851011048564

Emelo, R. (2012). Why personal reputation matters in virtual knowledge sharing. *Industrial and Commercial Training, 44*(1), 35-40. doi:10.1108/00197851211193408

Erdogan, B., Bauer, T. N., Peiro, J. M., & Truxillo, D. M. (2011). Overqualified employees: Making the best of a potentially bad situation for individuals and organizations. *Industrial and Organizational Psychology, 4*, 215-232. doi:10.1111/j.1754-9434.2011.01330.x

Erlingsson, C., & Brysiewicz, P. (2012). Orientation among multiple truths: An introduction to qualitative research. *African Journal of Emergency Medicine,* 1. doi:10.1016/j.afjem.2012.04.005

Fernandez-Araoz, C. (2014). 21st Century talent spotting: Why potential now trumps brains, experience, and competencies. Harvard Business Review, *92*, 46-56.

Fiegen, A. M. (2010). Systematic review of research methods: The case of business instruction. *References Services Review, 38*, 385-397. doi:10.1108/00907321011070883

Fleig-Palmer, M. M., & Schoorman, F. D. (2011). Trust as a moderator of the relationship between mentoring and knowledge transfer. *Journal of Leadership & Organizational Studies, 18*, 334-343. doi:10.1177/1548051811408615

Foss, N. J., Husted, K., & Michailova, S. (2010). Governing knowledge sharing in organizations: Levels of analysis, governance mechanisms, and research directions. *Journal of Management Studies, 47*, 455-482. doi:10.1111/j.1467-6486.2009.00870.x

Frederickson, E. (2010). When the music stops: Succession is more than filling seats. *State & Local Government Review, 42*(1), 50-60. doi:10.1177/0160323X10368518

Gao, H., Harford, J., & Li, K. (2012). CEO pay cuts and forced turnover: Their causes and consequences. *Journal of Corporate Finance, 18*, 291-310. doi:10.1016/j.jcorpfin.2012.01001

Ganu, J., & Boateng, P. A. (2012). Creating a culture of enterprising women through succession planning. *American Journal of Management, 12*(2), 69-80. Retrieved from http://www.na-businesspress.com/ajmopen.html

Gesell, I. (2010). How to lead when the generation gap becomes your everyday reality. *Journal for Quality & Participation, 32*(4), 21-24. Retrieved from http://asq.org/pub/jqp/

Gorman, M. F. (2010). A case study in effectively bridging the business skills gap for the information technology professional. *Journal of Education for Business, 86*(1), 17-24. doi:10.1080/08832321003663348

Gratton, L. (2011). Workplace 2025 – what will it look like? *Organizational Dynamics, 40*, 246-254. doi:10.1016/j.orgdyn.2011.07.002

Green, D. D., & Roberts, G. E. (2012). Impact of postmodernism on public sector leadership practices: Federal government human capital development implications. *Public Personnel Management, 41*(1), 79-96. doi:10.1177/009102601204100105

Guest, G., Bunce, A., & Johnson, L. (2006). How many interviews are enough? *Field Methods*, *18*, 59-82. doi:10.1177/1525822X05279903

Guion, L. A., Diehl, D. C., & McDonald, D. (2011). *Triangulation: Establishing the validity of qualitative studies*, (Report No. FCS6014). Retrieved from http://edis.ifas.ufl.edu/pdffiles/fy/fy39400.pdf

Gundersen, G., Hellesoy, B. T., & Raeder, S. (2012). Leading international project teams: The effectiveness of transformational leadership in dynamic work environments. *Journal of Leadership & Organizational Studies, 19*, 46-57. doi:10.1177/1548051811429573

Gursoy, D., Chi, C. G., & Karadag, E. (2013). Generational differences in work values and attitudes among frontline and service contact employees. *International Journal of Hospitality Management, 32*(1), 40-48. doi:10.1016/j.ijhm.2012.04.002

Hampel, S., Procter, N., & Deuter, K. (2010). A model of succession planning for mental health nurse practitioners. *International Journal of Mental Health Nursing, 19*, 278-286. doi:10.1111/j.1447-0349.2010.00668.x

Hanson, J. L., Balmer, D. F., & Giardino, A. P. (2011). Qualitative research methods for medical educators. *Academic Pediatrics, 11,* 375-386. doi:10.1016/j.acap.2011.05.001

Haskins, M. E., & Shaffer, G. R. (2010). Using executive education program rosters to identify a succession cohort. *Strategy and Leadership, 38*(5), 39-44. doi:10.1108/10878571011072075

Hau, Y. S., Kim, B., Heeseok, L., & Kim, Y. (2013). The effects of individual motivations and social capital on employees' tacit and explicit knowledge sharing intentions. *International Journal of Information Management, 33*, 356-366. doi:10.1016/j.ijinfomgt.2012.10.009

Haveman, R., Heinrich, C., & Smeeding, T. (2012). Policy responses to the recent poor performance of the U.S. labor market. *Journal of Policy Analysis and Management, 31*, 177-186. doi:10.1002/pam.20624

Hayati, D., Charkhabi, M., & Naami, A. (2014). The relationship between transformational leadership and work engagement in government hospitals nurses: A survey study. *SpringerPlus, 3*(25) 1-7. doi:10.1186/2193-1801-3-25

Hayes, A. J., & Omodei, M. M. (2011). Managing emergencies: Key competencies for incident management teams. *Australian and New Zealand Journal of Organisational Psychology, 4*(23), 1-10. doi:10.1375/ajop.4.1.1

Heredia, A., Garcia-Guzman, J., Amescua, A., & Sanchez-Segrua, M. (2013). Interactive knowledge asset management: Acquiring and disseminating tacit knowledge. *Journal of Information Science and Engineering, 29,* 133-147. Retrieved from http://www.iis.sinica.edu.tw/page/jise/Introduction.html

Hilger, S., Mankel, S., & Richter, A. (2013). The use and effectiveness of top executive dismissal. *The Leadership Quarterly, 24*(1), 9-28. doi:10.1016/j.leaqua.2012.07.001

Holste, S. J., & Fields, D. (2010). Trust and tacit knowledge sharing and use. *Journal of Knowledge Management, 14*(1), 128-140. doi:10.1108/13673271011015615

Horaguchi, H. (2014). *Collective knowledge management* [Monograph]. Retrieved from http://www.elgaronline.com/

Huskins, W. C., Silet, K., Weber-Main, A. M., Begg, M. D., Fowler, Jr., V. G., Hamilton, J., & Fleming, M. (2011). Identifying and aligning expectations in a mentoring relationship. *Clinical and Translational Science, 4*, 439-447. doi:10.1111/j.1752-8062.2011.00356.x

Hutzschenreuter, T., Kleindienst, I., & Greger, C. (2012). How new leaders affect strategic change following a succession event: A critical review of the literature. *The Leadership Quarterly, 23*, 729-755. doi:10.1016/j.leaqua.2012.06.005

Jacob, S. A., & Furgerson, S. P. (2012). Writing interview protocols and conducting interviews: Tips for students new to the field of qualitative research. *The Qualitative Report, 17*(6), 1-10. Retrieved from http://www.nova.edu/ssss/QR/

Jacobson, W. (2010). Preparing for tomorrow: A case study of workforce planning in North Carolina municipal governments. *Public Personnel Management, 39*, 353-377. Retrieved from http://ppm.sagepub.com/

Jorgensen, L., Dahl, R., Pedersen, P., & Lomborg, K. (2012). Evaluation of a multi-modal grounded theory approach to explore patients' daily coping with breathlessness due to chronic obstructive pulmonary disease. *Journal of Research in Nursing, 17*, 1-18. doi:10.1177/1744987111427418

Joshi, A., Dencker, J. C., & Franz, G. (2011). Generations and organizations. *Research in Organizational Behavior, 31*, 177-205. doi:10.1016/j.riob.2011.10.002

Joy, A., & Haynes, B. (2011). Office design for the multi-generational knowledge workforce. *Journal of Corporate Real Estate, 13*, 216-232. doi:10.1108/14630011111214428

Kang, J., Rhee, M., & Kang, K. H. (2010). Revisiting knowledge transfer: Effects of knowledge characteristics on organizational effort for knowledge transfer. *Expert Systems with Applications, 37*, 8155-8160. doi:10.1016/j.eswa.2010.05.072

Kar, S. K., & Samantarai, M. (2011). Narrative research on Bothra: An Indian family firm. *Society and Business Review, 6,* 131-148. doi:10.1108/17465681111143957

Kochanowski, Y. (2011). Human capital management in government: Replacing government retirees. *Journal of Health and Human Services Administration, 34*, 85-108. Retrieved from http://www.spaef.com/jhhsa.php

Koehler, J. W., & Pankowski, J. M. (1997). *Transformational leadership in government*. Delray Beach, FL: St. Lucie Press.

Kothari, A., Rudman, D., Dobbins, M., Rouse, M., Sibbald, S., & Edwards, N. (2012). The use of tacit and explicit knowledge in public health: A qualitative study. *Implementation Science, 7*, 20. Retrieved from http://implementationscience.com/

LaManna, R. J. (2012). Succession planning simplified. *Executive coaching for the printing industry*. Retrieved from http://www.rocklamanna.com

Leonard, H. S., & Lang, F. (2010). Leadership development via action learning. *Advances in Developing Human Resources, 12*, 225-240. doi:10.1177/1523422310367800

Li, Y. M., & Jhang-Li, J. H. (2010). Knowledge sharing in communities of practice: A game theoretic analysis. *European Journal of Operational Research, 207*, 1052-1064. doi:10.1016/j.ejor.2010.05.033

Lin, T. C., Wu, S., & Lu, C.T. (2012). Exploring the effect factors of knowledge sharing behavior: The relations model theory perspective. *Expert Systems with Applications, 39*, 751-764. doi:10.1016/j.eswa.2011.07.068

Linder, F., & Wald, A. (2011). Success factors of knowledge management in temporary organizations. *International Journal of Project Management, 29*, 877-888. doi:10.1016/j.ijproman.2010.09.003

Lloyd-Walker, B., & Walker, D. (2011). Authentic leadership for 21st century project delivery. *International Journal of Project Management, 29*, 383-395. doi:10.1046/j.ijproman.2011.02.004

Longhurst, R. (2010). Semistructured interviews and focus groups. In N. Clifford, S. French, & G. Valentine (Eds.). *Key methods in geography* (pp. 103-115). Thousand Oaks, CA: Sage.

Luhmann, N. (1995). Why systems theory. *Cybernetics & Human Knowing*, *3*(2), 3-10. Retrieved from http://www.chkjournal.org/

Malik, T. (2012). Positive effects of opinion-count on job satisfaction of team members in business enterprises. *Journal of Communication Management, 17*, 1-22. Retrieved from http://www.emeraldinsight.com/

Manu, A. (2010). *Leadership and technology solutions in small and medium companies* (Doctoral dissertation). Available from ProQuest Digital Dissertations and Theses database. (UMI No. 3412941)

Marottoli, R. A., & Coughlin, J. F. (2011). Walking the tightrope: Developing a systems approach to balance safety and mobility for an aging society. *Journal of Aging & Social Policy, 23*, 372-383. doi:10.1080/08959420.2011.605655

Marshall, C., & Rossman, G. (2011). *Designing qualitative research* (2nd ed.). Thousand Oaks, CA: Sage.

Maurer, I., Bartsch, V., & Ebers, M. (2011). The value of intra-organizational social capital: How it fosters knowledge transfer, innovation performance, and growth. *Organization Studies 32*, 157-185. doi:10.1177/0170840610394301

Maxwell, J. A. (2010). Using numbers in qualitative research. *Qualitative Inquiry*, *16*, 475-482. doi:10.1177/1077800410364740

McAlearney, A. S. (2010). Executive leadership development in U.S. health systems.

Journal of Healthcare Management, 55, 206-224. Retrieved from http://www.ache.org

McCall, M. W. (2010). Recasting leadership development. *Industrial & Organizational Psychology, 3*(1), 3-19. doi:10.1111/j.1754-9434.2009.01189.x

McDonnell, A., Lamare, R., Gunnigle, P., & Lavelle, J. (2010). Developing tomorrow's leaders - Evidence of global talent management in multinational enterprises. *Journal of World Business, 45*, 150-160. doi:10.1016/j.jwb.2009.09.015

Merat, A., & Bo, D. (2013). Strategic analysis of knowledge firms: The links between knowledge management and leadership. *Journal of Knowledge Management, 17*(1), 3-15. doi:10.1108/13673271311300697

Meriac, J. P., Woehr, D. J., & Banister, C. (2010). Generational differences in work ethic: An examination of measurement equivalence across three cohorts. *Journal of Business and Psychology, 25*, 315-324. doi:10.1007/s10869-010-9164-7

Molina-Morales, F. X., Martinez-Fernandez, M. T., & Torlo, V. J. (2011). The dark side of trust: The benefits, costs and optimal levels of trust for innovation performance. *Long Range Planning, 44*, 118-133. doi:10.1016/j.lrp.2011.01.001

Moustakas, C. (1994). *Phenomenological research methods*. Thousand Oaks, CA: Sage.

Murphy, S. E., & Johnson, S. K. (2011). The benefits of long-lens approach to leader development: Understanding the seeds of leadership. *The Leadership Quarterly, 22*, 459-470. doi:10.1016/j.leaqua.2011.04.004

Muskat, M., Blackman, D., & Muskat, B. (2012). Mixed methods: Combining expert interviews, cross-impact analysis and scenario development. *The Electronic*

Journal of Business Research Methods, 10, 9-21. Retrieved from http://www.ejbrm.com/main.html

Myung, J., Loeb, S., & Horng, E. (2011). Tapping the principal pipeline: Identifying talent for future school leadership in the absence of formal succession management programs. *Educational Administration Quarterly, 47*, 695-727. doi:10.1177/0013161X11406112

Neumark, D., Johnson, H., & Mejia, M. C. (2013). Future skill shortage in the U.S. economy? *Economics of Education Review, 32*, 151-167. doi:10.1016/j.econedurev.2012.09.004

Nonaka, I. (1994). A dynamic theory of organizational knowledge creation. *Organization Science*, *5* (*1*), 14-37. Retrieved from http://pubsonline.informs.org/doi/abs/10.1287/orsc.5.1.14

North, R., & Kumta, G. (2014). How to put knowledge management into practice. *Knowledge Management, 4*(9). 279-280. doi:10.10007/978-3-319-03698-4_9

Ojha, D., Gianiodis, P., & Manuj, I. (2013). Impact of logistical business continuity planning on operational capabilities and financial performance. *International Journal of Logistics Management, 24*, 180-209. doi:10.1108/IJLM-06-2012-0049

Orser, B. J., Elliott, C., & Leck, J. (2011). Feminist attributes and entrepreneurial identity. *Gender in Management: An International Journal*, *26*, 561-589. doi:10.1108/17542411111183884

Park, J., & Gursoy, D. (2012). Generation effects on work engagement among U.S. hotel employees. *International Journal of Hospitality Management, 31*, 1195-1202.

doi:10.1016/j.ijhm.2012.02.007

Pennell, K. (2010). The role of flexible job descriptions in succession management. *Library Management*, *31*, 279-290. doi:10.1108/01435121011046344

Perlman, B. J. (2010). Introduction: New rules and approaches for succession planning. *State and Local Government Review, 42*(1), 48-49. doi:10.1177/0160323X10368034

Polanyi, M. (1967). *The tacit dimension.* London, England: Routledge and Kegan Paul.

Pollack, J. (2012). Transferring knowledge about knowledge management: Implementation of a complex organisational change programme. *International Journal of Project Management, 30*, 877-886. doi:10.1016/j.ijproman.2012.04.001

Porcellato, L., Carmichael, F., Hulme, C., Ingham, B., & Prashar, A. (2010). Giving older workers a voice: Constraints on the employment of older people in the north west of England. *Work, Employment & Society, 24*(1), 85. doi:10.1177/0950017009353659

Rabionet, S. E. (2011). How I learned to design and conduct semistructured interviews: An ongoing and continuous journey. *Qualitative Report, 16,* 563-566. Retrieved from http://www.nova.edu

Reiter, S., Stewart, G., & Bruce, C. (2011). A strategy for delayed research method selection: Deciding between grounded theory and phenomenology. *The Electronic Journal of Business Research Methods, 9,* 35-46. Retrieved from http://www.ejbrm.com/volume9/issue1/p35

Renihan, P. J. (2012) Leadership succession for tomorrow's schools. *Procedia- Social and Behavioral Sciences, 55*(1), 138-147. doi:10.1016/j.sbspro.2012.09.487

Rhodes, C. (2012). Should leadership talent management in schools also include the management of self-belief. *School Leadership & Management, 32*, 439-451. doi:10.1080/13632434.2012.724671

Rohde, R. E., & Ross-Gordon, J. (2012). MRSA model of learning and adaptation: A qualitative study among the general public. *BMC Health Services Research, 12*(88), 22-31. doi:10.1186/1186/1472-6963-12-88

Rubin, H. J., & Rubin, I. S. (2012). *Qualitative interviewing: The art of hearing data.* (3rd ed.). Thousand Oaks, CA. Sage.

Sadler, G. R., Lee, H. C., Lim, R. S., & Fullerton, J. (2010). Recruitment of hard-to-reach population subgroups via adaptations of the snowball sampling strategy. *Nursing & Health Sciences, 12*(3), 369-374. doi:10.1111/j.1442-2018.2010.00541.x.

Salahuddin, M. (2011). Generational differences on leadership style and organizational success. *Journal of Diversity Management, 5*(2), 1-6. Retrieved from http://www.cluteinstitute-onlinejournals.com

Schatz, E. (2012). Rationale and procedures for nesting semistructured interviews in surveys or censuses. *Population Studies, 66,* 183-195. doi:10.1080/00324728.2012.658851

Schoonjans, B., Cauwenberge, P. V., & Bauwhede, H. V. (2011). Knowledge networking and growth in service firms. *The Service Industries Journal, 33*, 1051-1067. doi:10.1080/02642069.2011.632004

Shacklock, K., & Brunetto, Y. (2011). A model of older workers' intentions to continue working. *Personnel Review 40*, 252-274. doi:10.1108/00483481111106110

Shank, G. D. (2006). *Qualitative research:* A personal skills approach (2nd ed.). Upper Saddle River, NJ: Pearson.

Shover, N. (2012). Ethnographic methods in criminological research: Rationale, reprise, and warning. *American Journal of Criminal Justice*, *37*, 139-145. doi:10.1007/s12103-012-9160-8

Smith, E. A. (2001). The role of tacit and explicit knowledge in the workplace. *Journal of Knowledge Management*, *5*(4), 311-321. doi:10.1108/13673270110411733

Smith, W. K., Besharov, M. L., Wessels, A. K., & Chertok, M. (2012). A paradoxical leadership model for social entrepreneurs: Challenges, leadership skill, and pedagogical tools for managing social and commercial demands. *Academy of Management Learning & Education, 11*, 463-478. doi:10.5465/amle.2011.0021

Stanley, S. A. (2011). *A correlational study examining the relationship between social responsibility and financial performance* (Doctoral dissertation). Available from ProQuest Digital Dissertations and Theses database. (UMI Number: 3453666)

Stevens, R. H. (2010). Managing human capital: How to use knowledge management to transfer knowledge in today's multigenerational workforce. *International Business Research, 3*(3), 77-83. Retrieved from http://ccsenet.org/journal

Streb, C. K., & Gellert, F. J. (2011). What do we know about managing ageing teams? Lessons learned from the automotive shop floor. *Organizational Dynamics, 40*, 144-150. doi:10.1016/j.orgdyn.2011.01.009

Supyuenyong, V., & Swierczek, F. W. (2011). Knowledge management process and organizational performance in SMEs. *Journal of Knowledge Management, 7*, 1-21. doi:10.4018/jkm.2011040101

Thomas, E., & Magilvy, J.K. (2011). Qualitative rigor or research validity in qualitative research. *Journal for Specialist in Pediatric Nursing, 16,* 151-155. doi:10.1111/j.1744-6155.2011.00283.x

Thomas, S., & Kamalanabhan, T. J. (2012). Measuring emotional intelligence of the workplace. *International Journal of Business Innovation and Research, 6*, 418-432. doi:10.1504/IJBIR.2012.047275

Tounkara, T. (2013) increasing transferability of tacit knowledge with knowledge engineering methods. *Electronic Journal of Knowledge Management, (11)*3, 268. Retrieved from www.ejkm.com

Tse, H. M., Huange, X., & Lam, W. (2013). Why does transformational leadership matter for employee turnover? A multi-foci social exchange perspective. *The Leadership Quarterly, 24,* 763-776. doi:10.1016/j.leaqua.2013.07.005

Van Deventer, J. P. (2009). Ethical considerations during human centered overt and covert research. *Quality & Quantity, 43,* 45-57. doi:10.1007/s11135-006-9069-8

Van Manen, M. (1990). *Researching lived experience: Human science for an action sensitive pedagogy.* Albany, NY. Suny Press.

Venkitachalam, K., & Busch, P. (2012). Tacit knowledge: Review and possible research directions. *Journal of Knowledge Management, 16*, 357-372. doi:10.1108/13673271211218915 von Bertalanffy, L. (1950). An outline of general systems theory. *Emergence: Complexity & Organization, 10*(2), 103-123. Retrieved from http://www.emergence.org

von Krogh, G. (2012). How does social software change knowledge management toward a strategic research agenda? *The Journal of Strategic Information Systems, 21*(2), 154-164. doi:10.1016/j.jsis.2012.04.003

Wallace, D. P., Fleet, C. V., & Downs, L. J. (2011). The research core of the knowledge management literature. *International Journal of Information Management, 31*(1), 14-20. doi:10.1016/j.ijinfomgt.2010.10.002

White, M. (2011). *Rethinking Generation Gaps in the Workplace: Focus on Shared Values*. UNC Kenan-Flagler Business School. Retrieved from http://www.kenan-flagler.unc.edu/executive-development/custom-programs/~/media/C8FC09AEF03743BE91112418FEE286D0.ashx

Wilderon, R. M., van den Berg, P. T., & Wiersma, U. J. (2012). A longitudinal study of the effects of charismatic leadership and organizational culture on objective and perceived corporate performance. *The Leadership Quarterly, 23,* 835-848. doi:10.1016/j.leaqua.2012.04.002

Wilkesmann, M., & Wilkesmann, U. (2011). Knowledge transfer as interaction between experts and novices supported by technology. *VINE, 41,* 96-112. doi:10.1108/03055721111134763

Williams, C. (2007). Research methods. *Journal of Business & Economic Research, 5*(3), 65-72. Retrieved from http://journals.cluteonline.com.index.php/JBER

Williams, S., & Schaefer, A. (2013). Small and medium-sized enterprises and sustainability: Managers' values and engagement with environmental and climate change issues. *Business Strategy and the Environment*. *22*(3), 173–186. doi:10.1002/bse.1740

Woods, P. A., & Woods, G. J. (2010). The geography of reflective leadership. *Philosophy of Management, 9*(2), 81-97. doi:10.5840/pom20109213

Xu, M. A., & Storr, G. B. (2012). Learning the concept of researcher as instrument in qualitative research. *The Qualitative Report 17*, 1-18. Retrieved from http://files.eric.ed.gov/

Yin, R. K. (2014). *Case study research design and methods.* (5th ed.). Thousand Oaks, CA: Sage.

Yong, S. H., Byoungsoo, K., Heeseok, L., & Young-Gul, K. (2013). The effects of individual motivations and social capital on employees' tacit and explicit knowledge sharing intentions. *International Journal of Information Management, 33*, 356-366. Retrieved from http://www.sciencedirect.com/science/article

Zepeda, S. J., Bengtson, E., & Parylo, O. (2012). Examining the planning and management of principal succession. Journal of Educational Administration, 50, 136-158. doi:10.1108/09578231211210512

Appendix A: Consent Form

Consent Form

You are invited to take part in a research study of Strategies to Retain Tacit Knowledge from baby boomers. Tacit knowledge is the knowledge we all have in our minds, is not written down, do not share with others, and take with us when we leave the organization. The researcher is inviting leaders with one year of supervisory experience who are available for a face-to-face interview, and supervise at least one employee, to be in the study. This form is part of a process called "informed consent" to allow you to understand this study before deciding whether to take part.

This study is being conducted by, Rhonda Corwin, who is a doctoral student at Walden University.

Background Information:
The purpose of this qualitative case study is to explore what strategies local government leaders need to retain tacit knowledge of baby boomer employees.

Procedures:
If you agree to be in this study, you will be asked to:
- reply to this email with the words 'I Consent'
- agree to an audio recording of the interview for transcription purposes where participants are identified on the audio by P1, P2, and so forth
- answer questions regarding experiences with knowledge sharing
- share any artifacts illustrating the use of knowledge management systems that may include organizational charts, succession planning forms, or records
- participate in the interview within 5 calendar days of replying with the words 'I Consent', and
- allow approximately 45 minutes to complete the interview process.

Here are some sample questions:

- What methods, if any, does your organization use to store and retain tacit knowledge retrieved from exiting baby boomers?
- How do personnel share tacit knowledge in your organization?
- What additional information can you provide to help me understand how your organization gathers and retains tacit knowledge?

Voluntary Nature of the Study:
This study is voluntary. Everyone will respect your decision of whether or not you choose to be in the study. No one at this agency, or Walden University will treat you differently if you decide not to be in the study. If you decide to join the study now, you can still change your mind later. You may stop at any time.

Risks and Benefits of Being in the Study:
Being in this type of study involves some risk of the minor discomforts that can be encountered in daily life, such as fatigue, stress or becoming upset. Being in this study would not pose risk to your safety or wellbeing.
Positive social change may result from taking advantage of the human capital and resources the baby boomer population characterizes, and educating other government leaders to improve performance within government agencies.

Payment:
No compensation is available for participating in the study.

Privacy:
Any information you provide will be kept confidential. The researcher will not use your personal information for any purposes outside of this research project. Also, the researcher will not include your name or anything else that could identify you in the study reports. Data will be kept secure on an external drive locked in a fire-protected safe accessible only by me, and destroy data after 5 years, as required by the university. If a participant reports criminal activity, the researcher must report the activity to the study organization, according to the organization's policy.

Contacts and Questions:
You may ask any questions you have now. Or if you have questions later, you may contact the researcher via phone 816-582-5203 or e-mail rhonda.corwin@waldenu.edu. If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. She is the Walden University representative who can discuss this with you. Her phone number is 612-312-1210. Walden University's approval number for this study is 10-07-14-0298860 and it expires on October 6, 2015**.** The researcher will give you a copy of this form to keep.

Statement of Consent:

I have read the above information and I feel I understand my legal rights, and the study well enough to make a decision about my involvement. By replying to this email with the words 'I Consent,' I understand that I am agreeing to the terms described above.

Appendix B: Interview Protocol

Interview: Strategies to Retain Tacit Knowledge from Baby Boomers

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

B. I will advise the participant I am sensitive of their time and thank them for agreeing to participate in the study.

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

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

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

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

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

Appendix C Interview Questions

The following research question will guide the research: What strategies do local government leaders need to retain tacit knowledge from retiring baby boomers?

1. What is your perception of how the exodus of baby boomers may affect your organization?
2. What is your perspective of the strategies your organization uses to capture tacit knowledge from baby boomers?
3. What is your experience retaining tacit knowledge from a person reporting to you?
4. What obstacles, if any, obstruct your attempts to retain tacit knowledge of baby boomers?
5. How, if at all, are you addressing these obstacles?
6. What tacit knowledge strategies will you share with colleagues before you retire?
7. What tacit information within the workplace holds value?
8. How do you determine what tacit knowledge holds a specific value?
9. What methods, if any, does your organization use to store and retain tacit knowledge retrieved from exiting baby boomers?
10. How do personnel share tacit knowledge in your organization?
11. What additional information can you provide to help me understand how your organization gathers and retains tacit knowledge?

Appendix D Non-Disclosure Agreement

CLIENT NON-DISCLOSURE AGREEMENT

This CLIENT NON-DISCLOSURE AGREEMENT, effective as of the date last set forth below (this "Agreement"), between the undersigned actual or potential client ("Client") and **Rev.com, Inc.** ("Rev.com") is made to confirm the understanding and agreement of the parties hereto with respect to certain proprietary information being provided to Rev.com for the purpose of performing translation, transcription and other document related services (the "Rev.com Services"). In consideration for the mutual agreements contained herein and the other provisions of this Agreement, the parties hereto agree as follows:

1. Scope of Confidential Information

1.1. "Confidential Information" means, subject to the exceptions set forth in Section 1.2 hereof, any documents or other text supplied by Client to Rev.com for the purpose of performing the Rev.com Services.

1.2. Confidential Information does not include information that: (i) was available to Rev.com prior to disclosure of such information by Client and free of any confidentiality obligation in favor of Client known to Rev.com at the time of disclosure; (ii) is made available to Rev.com from a third party not known by Rev.com at the time of such availability to be subject to a confidentiality obligation in favor of Client; (iii) is made available to third parties by Client without restriction on the disclosure of such information; (iv) is or becomes available to the public other than as a result of disclosure by Rev.com prohibited by this Agreement; or (v) is developed independently by Rev.com or Rev.com's directors, officers, members, partners, employees, consultants, contractors, agents, representatives or affiliated entities (collectively, "Associated Persons").

2. Use and Disclosure of Confidential Information

2.1. Rev.com will keep secret and will not disclose to anyone any of the Confidential Information, other than furnishing the Confidential Information to Associated Persons; provided that such Associated Persons are bound by agreements respecting confidential information. Rev.com will not use any of the Confidential Information for any purpose other than performing the Rev.com Services on Client's behalf. Rev.com will use reasonable care and adequate measures to protect the security of the Confidential Information and to attempt to prevent any Confidential Information from being disclosed or otherwise made available to unauthorized persons or used in violation of the foregoing.

2.2. Notwithstanding anything to the contrary herein, Rev.com is free to make, and this Agreement does not restrict, disclosure of any Confidential Information in a judicial, legislative or administrative investigation or proceeding or to a government or other regulatory agency; provided that, if permitted by law, Rev.com provides to Client prior notice of the intended disclosure and permits Client to intervene therein to protect its interests in the Confidential Information, and cooperate and assist Client in seeking to obtain such protection.

3. Certain Rights and Limitations

3.1. All Confidential Information will remain the property of Client.

3.2. This Agreement imposes no obligations on either party to purchase, sell, license, transfer or otherwise transact in any products, services or technology.

4. Termination

4.1. Upon Client's written request, Rev.com agrees to use good faith efforts to return promptly to Client any Confidential Information that is in writing and in the possession of Rev.com and to certify the return or destruction of all Confidential Information; provided that Rev.com may retain a summary description of Confidential Information for archival purposes.

4.2. The rights and obligations of the parties hereto contained in Sections 2 (Use and Disclosure of Confidential Information) (subject to Section 2.1), 3 (Certain Rights and Limitations), 4 (Termination), and 5 (Miscellaneous) will survive the return of any tangible embodiments of Confidential Information and any termination of this Agreement.

5. Miscellaneous

5.1. Client and Rev.com are independent contractors and will so represent themselves in all regards. Nothing in this Agreement will be construed to make either party the agent or legal representative of the other or to make the parties partners or joint venturers, and neither party may bind the other in any way. This Agreement will be governed by and construed in accordance with the laws of the State of California governing such agreements, without regard to conflicts-of-law principles. The sole and exclusive jurisdiction and venue for any litigation arising out of this Agreement shall be an appropriate federal or state court located in the State of California, and the parties agree not to raise, and waive, any objections or defenses based upon venue or forum non conveniens. This Agreement (together with any agreement for the Rev.com Services) contains the complete and exclusive agreement of the parties with respect to the subject matter hereof and supersedes all prior agreements and understandings with respect thereto, whether written or oral, express or implied. If any provision of this Agreement is held invalid, illegal or unenforceable by a court of competent jurisdiction, such will not affect any other provision of this Agreement, which will remain in full force and effect. No amendment or alteration of the terms of this Agreement will be effective unless made in writing and executed by both parties hereto. A failure or delay in exercising any right in respect to this Agreement will not be presumed to operate as a waiver, and a single or partial exercise of any right will not be presumed to preclude any subsequent or further exercise of that right or the exercise of any other right. Any modification or waiver of any provision of this Agreement will not be effective unless made in writing. Any such waiver will be effective only in the specific instance and for the purpose given.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed below by their duly authorized signatories.

CLIENT

Print Name:____________________

By: ____________________
Name:
Title:
Date:

Address for notices to Client:

____
____
____
____

REV.COM, INC.

By: [signature]
Name: David Abramowitz
Title: CFO
Date: 6/6/14

Address for notices to Rev.com, Inc.:

251 Kearny St. FL 8
San Francisco, CA 94108

Appendix E: Invariant Constituents to Interview Questions

Table E1. How the Exodus of Baby Boomers Affects the Organization

What is your perception of how the exodus of baby boomers may affect your organization?

Invariant Constituents	# of participants to offer this experience	% of participants to offer this experience	Participants offering this experience
It is actually a very significant loss because at the same time I'm balancing Generation Y, which studies say they're only going to be around for 1 to 2 years for the first 10 years of their work experience. Even if I have a vested member that I try to share and develop with a mentoring program, an experienced person, that baby boomer generation before they leave, is going to be gone within 1 to 2 years, so it would be detrimental to any longstanding organization that has a lot of people with institutional knowledge, is how we refer to it in our organization over the years, and as I lose those people, that institutional knowledge is going to be lost because even when I can share it, it's not going to remain.	6	100	P1, P2, P3, P4, P5, P6
The issue is large or vast with the type of work that we do. It's critical that we try to pass on as much information as we can just based on job experiences. You can write policies, you can write procedures but so much of it is actually how do we do it, how did we do it, what's changed. Some of the more senior officers in the command staff have experiences in different philosophies in how to motivate or abstract information or how to give direction on how to do something that the new generation does not yet	6	100	P2, P1, P3, P4, P5, P6

understand.			
A lot of knowledge is walking out the door that the younger employees just don't have. Some I think have been passed on to them over time, but I don't think that you can ever truly get all the intelligence and knowledge levels out of these older employees that are departing to get the younger employees to the level that these guys and gals are when they're leaving.	6	100	P3, P1, P2, P4, P5, P6
I think it's going to be somewhat problematic and difficult for the agency to deal with. The other problem I think it presents is for employees fairly young in their careers, and a lot of the institutional knowledge will leave with the baby boomers. The younger generation, that middle generation would have had the opportunity to gain some of the knowledge from the baby boomers that have been around for a while, but the younger generation will miss that institutional knowledge.	6	100	P4, P1, P2, P3, P5, P6
It is going to have a major affect on how we move forward in the 2nd and 3rd decades of the 21st century.	6	100	P5, P1, P2, P3, P4, P6
I think that we're losing a huge amount of knowledge in transfers and retirements.	6	100	P6, P1, P2, P3, P4, P5,

Table E2. Strategies to Capture Tacit Knowledge

What is your perspective of the strategies your organization uses to capture tacit knowledge from baby boomers?

Invariant Constituents	# of participants to offer this experience	% of participants to offer this experience	Participants offering this experience
Trying to improve our documentation of their training and experiences and organizational plans, response plans, tentative challenges, operational experiences The only problem is that's usually only retained by very few at the top, not really funneled down to people who need the work knowledge as work is going on following that.	1	17	P1
I think that we try really hard to mentor. It's a key component of this job for one. We try to place senior staff with new staff from the time that they come into the organization We try to do a one on one for training programs to where it's hands on but many instances the information is passed verbally from the experience component of the senior employee back to the new employee which there is no way you can put in a book so we try really hard to use that as one of our programs for the education of the new person and for us to try to pass along as much information as we can from that side.	5	83	P2, P3, P4, P5, P6
A lot of the baby boomers we currently still have working for us, we have two in particular assigned to the area that I'm in are a plethora of knowledge, both of which have been promoted and in positions to mold and teach younger employees.	5	83	P3, P4, P5, P6, P2,

I think a lot of the means that we use are informal means, whether it's a trainer-trainee relationship or the old water cooler method where they're just hanging around and talking. We don't really have a good formalized structure for removing that knowledge from baby boomers and institutionalizing it. Oftentimes when we're doing policy development or program development that generation will be involved in some fashion in it, and that's probably the most formalized way that you're getting that information as they're helping to develop that policy or they're helping to develop the project. They'll come in and say "We did this 20 years ago and these are the things we ran into," or "You guys might think about doing this or doing that.	5	83	P4, P2, P3, P5, P6
Our agency is very cognizant of individuals with specific information and knowledge and my experience has been that we don't want to stovepipe that type of information.	1	17	P5
That information base is something spread across multiple individuals so that if we do lose 1 or even possibly 2 that we're still retaining the knowledge base there that gives us that ability to go back and instruct those new people with that inherent information that those individuals are maintaining that may not be written down somewhere.	5	83	P6, P2, P3, P4, P5,

Table E3. Experience Retaining Tacit Knowledge

What is your experience retaining tacit knowledge from a person reporting to you?

Invariant Constituents	# of participants to offer this experience	% of participants to offer this experience	Participants offering this experience
Sitting down and having an open question and answer session	2	33	P2, P3
Asking how did you do that, and how did you know to do that	1	17	P3
Identifying, developing, and sharing documentation	3	50	P4, P5, P6
Share locations of data	2	33	P5, P6
Share email	1	17	P6

Table E4. Obstacles That Obstruct Attempts to Retain Tacit Knowledge

What obstacles, if any, obstruct your attempts to retain tacit knowledge of baby boomers?

Invariant Constituents	# of participants to offer this experience	% of participants to offer this experience	Participants offering this experience
I am in charge of and I have day-to-day contact with maybe 5 to 10 people on a regular basis. That means a lot of times the people with the information and knowledge outside of those 5 to 10 people I may come into contact on a regular basis, I don't even get the opportunity to ask that question.	1	17	P1
It would be time as much as anything. The only other obstruction is probably the baby boomers themselves. Their philosophies on employment are not quite the same. They're more of a nine to five job	2	33	P2, P4
We don't have a good structure for trying to extract that knowledge from them in a formalized manner. The other big obstacles I think are generational differences in how the generations perceive their place in the workforce. A lot of our employees that are of the baby boomer generation would give the appearance that their job is to do as they're instructed and it's not to make waves. A lot of times that knowledge is there beneath the surface but they're not offering it up. It has to be drawn out of them.	2	33	P4, P2

Table E5. How Obstacles are Addressed

How, if at all, are you addressing these obstacles?

Invariant Constituents	# of participants to offer this experience	% of participants to offer this experience	Participants offering this experience
I try to coordinate that information flowing between the supervisory and management group in my division. We also try to use that information and experience to try to mentor our newer and involved people. Again, though, the problem is that's more of a revolving door based on the type of generation that we're bringing in as employees.	1	17	P1
We're trying to specifically sit down and ask questions. We're trying to train them that the knowledge they have, the experience they have is important Trying to get the report system up, find more time to read it	3	50	P2,P3, P4
A lot of questions	3	50	P3, P2, P4
Usually that roundtable discussion on what we're going to be doing and why we're looking at doing the change will usually end up eliciting the information that's residing in their head.	3	50	P4, P3, P2
By maintaining the communications and cross-training individuals in positions	1	17	P5
Training replacements is how we're going to be able to get through the departure of our senior people and carry forward some of the previous way of how things are operated, how the department works, but also it will allow for the newer generation to come up with brilliant ideas of their own and to really take us that much further.	3	50	P6, P5, P2

Table E6. Tacit Knowledge Strategies to be Shared Before Retirement

What tacit knowledge strategies will you share with colleagues before you retire?

Invariant Constituents	# of participants to offer this experience	% of participants to offer this experience	Participants offering this experience
I've mentioned already the importance of after-action reports Some sort of living document	3	50	P1, P5, P6
I try to have the open door for questions When we face opportunities or challenges we try to bring them up I'm trying to bring the knowledge and information I have back in the past back in to those meetings I would make it a point to try and sit down and answer any questions I think it's critical that I leave this better than it was when I got it so I try and pass it on	2	33	P2, P5,
I think to effectively answer that I would first have to figure out how to get the information and the knowledge that I have in an explainable way to where someone could retain it. I think first I have to figure out how to take it out of my own brain before I can learn to teach it and instill it into someone else's.	3	50	P3, P2, P4
Between figuring out the things that you have in place, figuring out what people you have, why we started it doing it that way, and then from your end, documenting your reasoning behind why you're doing something, I think will	2	33	P4, P1

help future generations figure out why this was done a particular way			
Educating our peers I will give as much headway or leeway or heads up that I'm going so that I can pass all this information on. That's the only way that we're going to be able to get it.	3	50	P5, P1, P6
We can definitely ensure that we're training our replacements	3	50	P6, P1, P5,

Table E7. What Tacit Knowledge Holds Value

What tacit information within the workplace holds value?

Invariant Constituents	# of participants to offer this experience	% of participants to offer this experience	Participants offering this experience
There's always changes in case law or in business practice or things that this baby boomer may hold onto	3	50	P1, P3, P4
There's a lot of it	2	33	P2, P6
I think it depends on the division in which you work and the assignment in which you're assigned, the tactic knowledge that you're going to have and retain over the years is going to be different.	3	50	P3, P1, P4
Beyond the job experience that individuals gain, this is a profession where you learn something new every day no matter how long you've been in the profession Those things you don't see every day that pop up every five, ten, 15 years, those things in particular are very valuable.	3	50	P4, P1, P3
Value is based off of the person that doesn't have it	1	17	P5
So much information... that's a difficult one	2	33	P6, P2

Table E8. How to Determine What Tacit Knowledge Holds Value

How do you determine what tacit knowledge holds a specific value?

Invariant Constituents	# of participants to offer this experience	% of participants to offer this experience	Participants offering this experience
You may have this baby boomer's perspective or even a group of baby boomer employees that have that perspective and then you have to evaluate, does this still hold water today in this environment	1	17	P1
I don't know... to be honest with you	3	50	P2, P6, P5
It is division specific	1	17	P3
Really I think that's just based on the situation that you're facing	1	17	P4
I can't say that I've delved that deeply into it	3	17	P5, P2, P6
Not sure	3	50	P6, P5, P2

Table E9. Methods to Store and Retain Tacit Knowledge

What methods, if any, does your organization use to store and retain tacit knowledge retrieved from exiting baby boomers?

Invariant Constituents	# of participants to offer this experience	% of participants to offer this experience	Participants offering this experience
After action reports Documentation is at least a starting point	4	67	P1, P2, P4, P5
I don't know that we actually store anything. Mentoring, working with each other, teaching I have no organization set up or way to capture that information We have nobody else here that can do that, we have nobody here to teach	2	33	P2, P3
I really don't know.	2	33	P3, P2
I think most of it's done by the water cooler method I think a lot of the tacit knowledge is passed from generation to generation just by chewing the fat, telling war stories, things of that nature I think most people just hold that information in their head, and then it becomes tacit knowledge into that generation We do write it down and create a document that memorializes	2	33	P4, P5
Take copious amounts of notes Sitting down and on multiple occasions Going back and picking the brains of my predecessors, "What did you do?	2	33	P5, P4

How did you start this out? What was your plan of attack? Can you give me some historical foundation for this and what you did and why you did it? Regular meetings			

Table E10. How Personnel Share Tacit Knowledge

How do personnel share tacit knowledge in your organization?

Invariant Constituents	# of participants to offer this experience	% of participants to offer this experience	Participants offering this experience
Primarily through war stories	3	50	P1, P2, P3
They talk to each other We solicit information from employees Mentoring programs Anybody here is capable of asking anybody a question and that question at times is back to, "Here's the problem, how did we use to do this." we will sit down and let them watch I can teach it by seeing it	3	50	P2, P1, P3
Frequent supervisory meetings The supervisors go to their respected shift assignments and they take that information and pass it down to their subordinates	3	50	P3, P2, P1
I think the bulk of it's done one on one personal interactions	2	33	P4, P5
Our regular meetings and our very frequent emails and our individual meetings, one on one trying to secure or solicit that information.	2	33	P5, P4

Table E11. How the Organization Gathers and Retains Tacit Knowledge

What additional information can you provide to help me understand how your organization gathers and retains tacit knowledge?

Invariant Constituents	# of participants to offer this experience	% of participants to offer this experience	Participants offering this experience
The culture that we've really tried to develop here has been more mentoring I try to use those people that have the stories and the institutional knowledge, and this is why we've done this and this is where this came from, this is why it's important. Any time you can explain that to somebody usually improves that understanding of what our goals are as an organization.	5	33	P1, P3, P4, P5, P6
I don't know that there's a required responsibility for an employee to retain it it relies up on mentoring	2	33	P2, P1
When tragedy strikes, we find a person that can best help us knowledge-wise to get through it.	5	83	P3, P1, P4, P5, P6
In some regard that stifles a passing of tacit knowledge because you have a hierarchy, you have a chain of command, and you tend to interact freely with people at your level, not so much above, not so much below. That will present a barrier in passing that knowledge either in a formalized or a less formalized structure.	5	83	P4, P1, P3, P5, P6
We just talk, and we communicate with each other, and ensure that everybody	5	83	P5, P1, P3, P4, P6

else is aware of projects that are going on			
It's the relationships that we're building. It's the communications that we're able to have with each other. It's not adversarial. It's towards a common goal.	5	83	P6, P1, P3, P4, P5,

Appendix F: Curriculum Vitae

Curriculum Vitae

Rhonda J Corwin

Executive Profile

High performing professional who can collaborate with executives and strategic business partners to identify organizational development priorities and implement initiatives to address priorities. Exceptional analytical, problem solving, and project management skills; quickly identifies and capitalizes on improvement opportunities.

Skill Highlights

Accreditation experience	College instruction
Organizational improvements	Transcript evaluation
Manage educational programs	Change management initiatives
Project management	Budget responsibilities
Team development	Faculty coaching and training
Curriculum development	Conflict mediation

Professional Experience

Academic Dean Skousen School of Business
January 2009 to 2011
Grantham University – Kansas City, MO
Developed academic policies and programs for Grantham University. Directed and coordinated activities of faculty and chairpersons in the school of business, computer science, and engineering. Determined scheduling of courses and recommended implementation of additional courses. Taught one business course per quarter as needed. Served as the liaison for the accrediting agencies that evaluated the academic programs. Administered, designed, and project managed programs and services while providing strategic leadership. Promoted initiatives locally and nationally. Responsibilities included development of business programs, managing curriculum, academic and educational technologist employees. Served as the central point of contact for disciplinary problems and consulted with the Human Resources department for training interventions.

Educational Consultant/Instructional Designer
2000 to 2008
Sprint University of Excellence – Overland Park, Kansas
Designed and project managed an enterprise wide web based compliance program, resulting in the consolidation of 15 training courses, 10 company Web sites, and two employee manuals. Compliance increased from a median value of 70% to 93%.

Training development hours decreased by 15 percent and are projected to decrease an additional 30 percent in subsequent years with an estimated cost savings of 6.3 million dollars. This project was presented to the American Society for Training & Development as best practices in compliance training and was submitted for an award.

Management Development Trainer
1997 to 1999
DST Systems
- Developed training for managers and executives. Facilitated Franklin Covey, Achieve Global and other many other types of vendor training nationwide.
- Recommended, administered and facilitated Criterion Reference Instruction (CRI) for the Center for Education and Development.

Human Resources Manager
1996 to 1997
Norrell Services Incorporated – Kansas City, Missouri
- Surpassed revenue goals in four consecutive quarters.
- Provided contract employees for DST Systems as well as UPS, KCP&L, and Toyota Warehousing.
- Monitored regional budget and reported revenue generation.

Training and Development Facilitator
1995-1996
American Century Investments
- Obtained 6 & 63 license to become a mutual fund representative.
- Developed, facilitated and evaluated new hire training programs.
- Trained new mutual fund representatives in a classroom setting for six weeks.

Education

Walden University
Doctor of Business Administration
DBA with a Specialization in Leadership - ABD - Expected Graduation 2015

MidAmerica Nazarene University
Masters of Business Administration (MBA)
MidAmerica Nazarene University
Bachelors of Arts in Management and Human Relations (MHR)

Memberships

Kansas City Professional Development Council (KCPDC) 2010 - present
Train members of academic organizations in the Kansas City metropolitan region in supervisory skills. Participants include faculty and administrators from Park College, Johnson County Community College, and William Jewel to name a few. Courses designed and taught include:

- The Role of a Supervisor
- Creating Performance Expectations