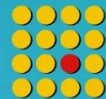




HORIZONTE ACADÉMICO

Transformando la educación: la innovación como motor de cambio

Coords.
Alba Vico Bosch
Luisa Vega Caro



EGREGIUS
ediciones

TRANSFORMANDO LA EDUCACIÓN:
LA INNOVACIÓN COMO MOTOR DE CAMBIO



H O R I Z O N T E A C A D É M I C O

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NEW CHALLENGES FOR HIGHER EDUCATION: THE NEED TO IDENTIFY AND TRANSFER COMPETENCES IN THE GENERATIONAL HANDOVER PROCESSES

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1. INTRODUCTION

The changes given in the society as well as the in the labour market has impacted the organizations competitiveness. These changes have influenced the structure, values and the organizations objectives. Currently, the employees are the center of the organization and the most valuable asset of companies is their knowledge (Beazley et al., 2002). One of the main consequences of this new reality of organizations is the high employee turnover (Ali & Mehreen, 2019). This phenomenon affects on the organization's knowledge retention as it complicates the registration of key employees' knowledge, competences and skills (Farooq, 2021). When it comes to creating a procedure to retain this knowledge, organizations find difficulties (Levy, 2011). Organizations start looking for these kinds of strategies when employees that have been working on the company for years start getting retired (Lombardi, 2019). The retirement process can be long but the management of their knowledge also can take years to the departments that are in charge of this process (Najafipour et al., 2022). The problem starts when there is no department on the organization that works with knowledge management (Torabi & El-Den, 2017).

Indeed, problems are also found when companies do not find necessary to priorities the management of employees' competences. The identification of the employee's competences as well as their knowledge is crucial not only to maintain the organization's competitiveness in the market but also for the recruitment of a new employee to replace the employee that is about to retire (Swanson et al., 2020). Thus, Once there are identified which are the skills and competences to carry out a specific task or job it will be easier to decide which internal or external candidate should take the job position (Halberstadt et al., 2019). In other words, it is important to identify the characteristics of the jobs that carry out employees who have key knowledge and know-how of the organization (Abili et al., 2011). Once the specific qualities of each key position are identified, it will be easier to search for candidates, transmit the knowledge and skills necessities to maintain organizational knowledge.

The mentioned procedures facilitate to continue producing and growing exponentially while maintaining business competitiveness in the labor market (Lombardi, 2019). To persevere the efficiency and the competitiveness of the company in the labour market, it is necessary to carry out a good knowledge transfer strategy (Burmeister et al., 2020). To this end, generational replacement processes are strategic elements to find candidates on the market or in the organization to maintain the needed knowledge and competencies in the organization, bringing effectiveness to the company (Najafipour et al., 2022). The implementation of these procedures helps on the identification of the competences of the employees and the roles that are carried out in each job position (Jackson, 2019). Carrying out these procedures can be a time and energy investment for organization, but in the long term it is fruitful for companies (Ali & Mehreen, 2019).

The correct creation and application of these procedures can help on the identification of the necessary skills of an employee to carry out a task. Moreover, on the long-term generational handover processes can help mitigate the knowledge loss of the organization and strengthen the organization culture, values and employees' engagement (Hall-Ellis, 2015). Definitively, organizations should take the generational handover processes as a matter of importance in their organizational objectives.

2. ORGANISATIONS

Organisations are experiencing difficulties on the employee's last stage of their careers, which is retirement, due to the lack of management on the retention of their knowledge (Calo, 2008). The generation that has already started getting ready for the retirement are baby boomers and one of the characteristics of this generation is that, on general basis, they have spent their entire professional careers on the same company (Cvenkel, 2020). Thus, the developed knowledge of an employee with these characteristics during the last 40 years in a specific position is very valuable for the company (Cox & Overbey, 2022). The knowledge of an employee in a key position can bring the company competitiveness, distinction, and positive economic impact (Eaglebarger, 2017). The demographic pyramids of the countries of the EU-28 show that there is not going to be enough personnel to hold up the high amount of the retirements of baby boomers (European Commission, 2014). Indeed, some organisations state that they do not have any kind of strategies to carry out knowledge transmission on their workforce (Ali & Mehreen, 2019). The lack of strategy and the decreasing number of candidates in the labour market, complicates the succession of specific job positions (Johnson, et al., 2018). The current socioeconomic situation in the labour market is related the falling birth rate in the last decades and the change of mentality on the new generations (millennials, generations Y and Z) (Cucina, et al., 2018). The mentioned last two generations are the most who differ from the baby boomers in terms of the organisational values (Gabrielova & Buchko, 2021).

2.1 KNOWLEDGE RETENTION

Knowledge retention happens when experienced employees that are about to retire transfer effectively knowledge to junior or senior employees that are willing to stay in the company (Ropes, 2013). Thus, knowledge retention is understood as a bidirectional learning process because both employees learn: the employee with less experience learns from the know-how of the expert employee, whereas the more experienced employees can learn from younger generations' knowledge of the management of technical and digital resources (Ebrahimi et al., 2008).

Knowledge retention is also known as intergenerational knowledge transfer and it is essential for companies' survival on an era where the retirement of baby boomers is going to increase exponentially on the following years and there is not going to be enough workforce on the labour market to replace the retirees (Harvey, 2012). Knowledge retention is key for organisations to create strategies and procedures to overcome the mentioned problems (Burmeister & Deller, 2016). Thus, knowledge retention consists on maintaining and not losing the knowledge that has been created by employees on the organisation during years (Martins & Meyer, 2012). The success of knowledge transfer is based on the ability of the younger employees to internalise and apply the learned concepts and the know-how of the experienced employees that are about to retire (Beazley et al. 2002). An important factor in order to retain knowledge on the organization is motivation, thus, reward strategies should be applied when knowledge transfer is carrying out (Ropes, 2014).

When it comes to knowledge retention in organizations, it is necessary to carry out strategies (Ramona & Alexandra, 2019). According to Levy (2011) one key factor to transfer knowledge is creating a planification and afterwards implementing the designed plan. When it comes to the strategies, it is important to highlight the significance of considering the unexpected situations that could happen in the knowledge transfer process during the retirement of an employee as well as the best practices (Levy, 2011). These strategies to retain organizational knowledge can be based on technological or non-technological resources, the choice would depend on the company's priorities (Levallet & Chan, 2019).

The retirement, the process to leave the company, has a direct effect on the knowledge retention (Martins & Meyer, 2012). The research carried out by Farooq (2021) shows that those employees that have a positive retirement are more prompted to share their knowledge and have more efficient results than the ones that had a bad experience on their leave.

2.2 COMPETENCES

Competences are understood as the abilities, behaviors and the amount of knowledge that allows employees to carry out effectively their tasks at work and on academic and personal settings (Jackson, 2019). In higher education organizations, the academic employees' knowledge and working strategies are key factor for the competitiveness of the organizations (Zhao et al., 2021). Therefore, the role of the identification of the competences is necessary for knowledge retention and knowledge transfer strategies (Sikombe & Phiri, 2019). Identifying the competences needed for each position enables obtaining competitive advantages to the organization. The classification and identification of the competences will facilitate the planification of knowledge transfer strategies (Chernikova et al., 2021).

On the educational context, it is possible to identify two type of competences which are essential for the competitiveness of the of the organizations and to transfer the needed technical, theoretical and practical knowledge.

The transversal or soft competences (Miranda et al., 2021):

- Critical Thinking: The ability to face problems and carry out problem-solving techniques.
- Cooperation: The ability to administrate the work group and responsibilities through the group members in order to carry out a complex task.
- Collaboration: Having the skills to interact and work with other employees with different characteristics in projects.
- Communication: Having the ability to express their ideas in oral, graphic, or written ways using the needed technological resources.
- Creativity & Innovation: Being able to design, develop and research solutions to problems or to carry out a project.

And, the disciplinary or hard competences which are (Miranda et al., 2021):

- Training and development of functional, technical and technological knowledge skills for successful workplace performance. Working on these abilities is essential for specific tasks that are carried out in departments.
- Promote the capacity to research, design, create and implement new technologies. This ability is key for modern educational contexts as the majority of job positions in higher education setting require developing these skills to carry out daily tasks.
- Promote the use of emerging technologies and best practices to propose technology-based solutions. In relation to the last point, using these abilities will facilitate finding out solutions in a faster and more effective way.

In this way, the identification of competences in key positions is necessary for the competitiveness and effectiveness of organizations. Identifying competences will facilitate knowledge transfer processes because once is diagnosed the abilities that are needed to carry out a task is easier to train and gain the needed competences.

2.3 KNOWLEDGE TRANSFER

Organizational knowledge is understood as the mixture of the ability of employees to execute their tasks, also known as the know-how, and their theoretical internalised knowledge to carry out their duties on the workplace (Tsoukas & Vladimirou, 2001). Knowledge is in constant change; therefore, two key factors are needed to understand what knowledge transfer is: time and knowledge (Nerkar, 2003). Thus, those employees that spend more time in the organisation would have broader knowledge (Loebbecke et al., 2016).

Another factor that it should be considered is leadership. For organizations, leadership is essential, as it is an instrument that helps is an instrument that helps to align organizational values and employee values

(Ciulla, 2020). Leadership style defines the organizational culture (Arif et al., 2019), influences the internal communication of the organization (Yue et al., 2019), impacts employees' organizational commitment (Buil, et al., 2019) and on the organizational well-being of workers (Arnold, K. (2017). Likewise, it is a crucial element in organizational competitiveness (Azeem et al., 2021). Not all organizations have the same leadership style as each organization has its own structure, values and objectives, (Azeem et al., 2021). That is why not all leaders, managers or middle managers have the same personal and work characteristics. Depending on the type of leadership, the development and the transmission competencies of the employees will differ.

On business contexts it is possible to differ different type of knowledges: human knowledge that refers to the know-how of an individual when it comes to carry out a task (Zuboff, 1988); the social knowledge that consists on the contacts or the network that has an individual within a group or organisations (Cohen & Prusak, 2001); cultural knowledge means the individual's understanding of the organisation's working or behaving codes which is integrated on the organisation's culture (Ouchi, 1979); the last type of knowledge is structured knowledge which is based on the information that individuals need to know in order to work with the resources or machines that an organisation have (Zuboff, 1988).

According to Martinkenaite (2011) knowledge transfer needs to carry out in two phases, on the first stage organizations and employees need to acquire knowledge and afterwards, on the second stage, exploited it. In order to carry out an efficient knowledge transfer external knowledge should also consider (Wei Chong, 2011). In the study carried out by Abili et. al., (2011) they stated that one key factor for organizations in knowledge transfer is knowledge sharing between employees. The efficiency of knowledge sharing will depend on the organization's structure, the organization culture and the interaction of departments and employees (Lin, 2008).

Considering that the transmission of skills and knowledge is a key factor for organizational benefits, companies are implementing different strategies to extract and analyze the different modes of transmission between Poworkers (Tavasieva, et al., 2019). Despite being beneficial, one

of the problems faced by companies is that most workers do not want to share their knowledge with other colleagues (Somayeh, 2017). This may be due to lack of trust between peers (Poehebut et al., 2018), lack of a common vision within the organization (Slatten et al., 2021), organizational culture (Terzi, 2016) or the energy (fatigue) it may take for the individual to carry out this transmission of knowledge and skills (Dextras & Marchand, 2016). Another problem that organizations have is the lack of a procedure (Ali & Mehreen, 2019). This last problem stems from the diversity of the characteristics that each job position has (Haurer & Williams, 2020). Each sector, market and position have specific cognitive, physical, technical or social peculiarities, so creating a procedure requires a lot of precision in its design (Seo, 2021). Therefore, the difficulties come from the inability to identify the knowledge as key competencies of a position, and the creation of specific procedures.

Knowledge sharing strategies, and therefore, knowledge transfer procedures are needed on organizations such as universities or research centers where information is exchanged constantly (Nooshinfard & Nemati-Anaraki, 2014). Sharing information and knowledge between organizations or colleges can improve the work efficiency of employees and will give the organization an opportunity to maintain corporate knowledge (Yoon et al., 2011). In order to accomplish this, is necessary to work on the bidirectional trust of the employees or institutions that are working together (Kuo, 2013).

2.4 GENERATIONAL HANDOVER

One of the key strategies to avoid talent loss in higher education is to anticipate and predict the high number of retirements of scholars as the current lack of candidates in the labour market with the needed characteristics to retake the positions (Groves, 2018). This planification helps carrying out the knowledge transfer and retention, and it is called, generational handover (Jackson & Allen, 2022).

Generational handover is known as the transmission of (I) theoretical competences, (II) practical knowledge, (III) soft, social and technical skills and (IV) the know-how (Cox & Overbey, 2022) from an expert employee (that is ready to get retired) to a junior or new employee that

is going to take his/her position (Clarke et al., 2019). The purpose of generational handover is to maintain the necessary knowledge and skills in the organization (Tavasieva et al., 2019). This process focuses more on experienced workers who are close to retirement (Garcia, 2020). The aim of generational handover is to transfer the necessary competencies of a position in order to maintain the skills and the knowledge of the employee in the company, and thus, maintain business competitiveness (Pandiyani & Jayalashmi, 2016).

The research conducted by Ferrari (2021) stated that there are social mechanisms (social norms) and human behaviours (attitudes, perception of feasibility, strategic decision-making processes) that have direct negative influence on carrying out succession plans and generational handover processes as most of them are postponed. Indeed, not carrying out properly the generational handover processes can influence on the leadership of higher education institutions (Ahmad et al., 2020). According to Jackson & Allen (2022) an efficient generational handover needs a previous analysis of the culture, leadership, awareness of necessities of employees and analysis of internal talent of the institutions. This previous research on the organization should benefit institutions on the candidate selection to carry out the succession plan (Ritchie, 2020).

To provide high quality services in higher education is necessary to maintain knowledge (academic, technical...) and the know-how of the scholars even if they are retired or are going to retired in the following years (Muqadas et al., 2017). The talent loss of institutions due to an inappropriate knowledge transfer could have a direct effect on the competitiveness of departments, research groups and courses of higher education institutions (Puntillo et al., 2022). Therefore, generational handover strategies should be suggested in higher educational institutions to improve the standards and maintain knowledge in the organizations.

3. OBJECTIVES

To carry out this study, two research questions were established in order to analyse the need to identify and transfer competences in the generational handover processes:

- Research question 1: Identify the differences on the generational handover between the three main employment activities of a professor (university teaching, research, and management).
- Research question 2: Identify the effectiveness on the strategies to transfer the knowledge to the successors on the three employment activities of professors.

4. METHODOLOGY

4.1 PROCEDURE

To carry out this study, qualitative data was obtained through the responses given by participants in open questions related to the three main employment activities of professors (university teacher, research, management). To obtain results, etiquettes were added to key words in participants responses to gather concepts. This questionnaire was passed once to the participants to obtain the descriptive information.

4.2 PARTICIPANTS

The sample of this study is constituted by 70 university employees ready to get retired in the following years or that are already retired. 61.29% of the participants were male and the mean age of the sample was 64.7 years old.

4.3 INSTRUMENT

An ad-hoc questionnaire was created via Qualtrics. This questionnaire has different sections that cover different topics such as the retirement process in the organisation, knowledge transfer, emotions during the retirement, emotional intelligence, and resilience. To carry out this study, we have focused on the knowledge transfer section.

4.4 DESIGN

In order carry out this research we decided to choose a non-experimental design because there is no analysis of a control independent variable and we did not carry out any kind of intervention.

5. RESULTS

The results obtained related to the first research questions are that there were differences on the three main employment activities of professor. If we focus on the first activity which is university teaching, it is possible to state that the 36% of the participants consider essential to transfer the lectures competences, whereas the 31% says that aspects of methodology should be transferred, 31% mentioned that teaching knowledge should be transferred and just the 3% considered necessary to transfer interpersonal skills (on Table 1 there is explanation of the mentioned terms).

Figure 1 Essential skills to transfer on university teaching's generational handover

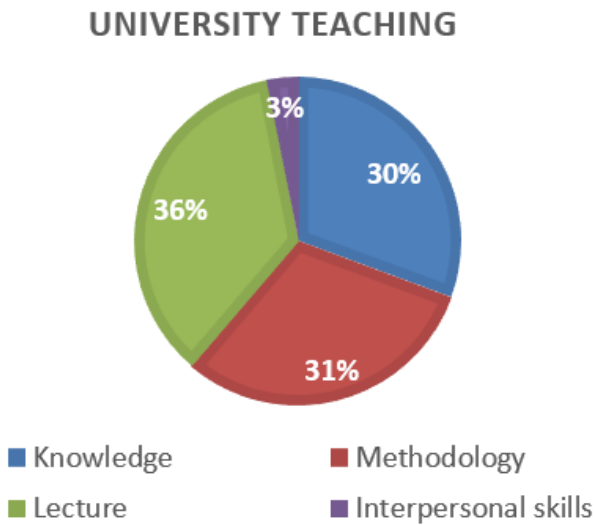


Table 1 Aspect to consider in the university teaching on the generational handover of a professor

Terminology used	Meaning
Knowledge	Content of the lectures, extracurricular activities, the expertise...
Methodology	Team building, lecturer’s orientation towards a subject, problem facing...
Lecture	Know-how, subjects, personal experience with students, work capacity...
Interpersonal skills	Responsibility, communication skills, empathy, university membership...

If we analyse the research aspects that participants consider important on the generational handover we could say that 48% stated that competences related to resources should be transferred, 30% of the participants stated that the know-how should be transferred, the 13% considers that skills related to team work should be explained, just the 9% said that skills related to knowledge should be transferred (on Table 2 there is explanation of the mentioned terms).

Figure 2 Essential skills to transfer on the university researcher’s generational handover

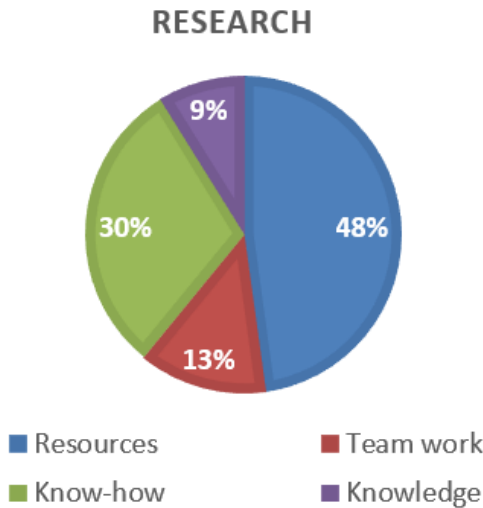


Table 2 Aspect to consider in research on the generational handover of a professor

Terminology used	Meaning
Resources	Organisation contacts, advanced techniques in qualitative research, ICT skills, learn how to reach projects
Teamwork	Responsibility, social and interpersonal skills, development of group values...
Know-how	Perseverance, research topic initiation, adjustment to the need of the project...
Knowledge	Steps to carry out a research, research aptitudes...

Taking into account the last activity of a professor, which is management, we can say that the 38% of the participants considered necessary to transfer soft skills, whereas the 31% considered necessary transmitting competencies for efficiency, the 23% of the participants considered important to work on knowledge aspects and just the 8% stated that interpersonal skills should be transferred to carry out a proper generational handover in the higher education (on Table 3 there is explanation of the mentioned terms).

Figure 3 Essential skills to transfer on the university management generational handover

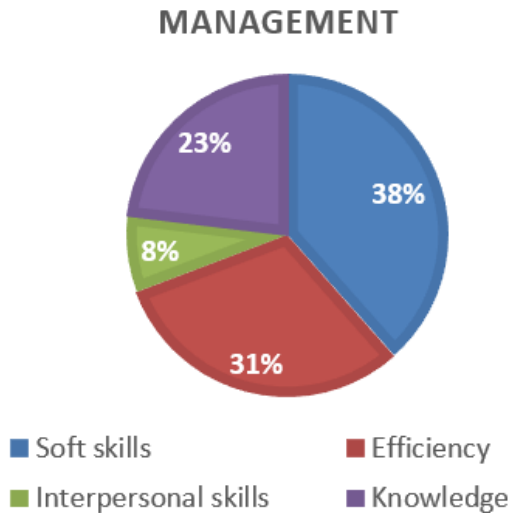


Table 3 Aspect to consider in management on the generational handover of a professor

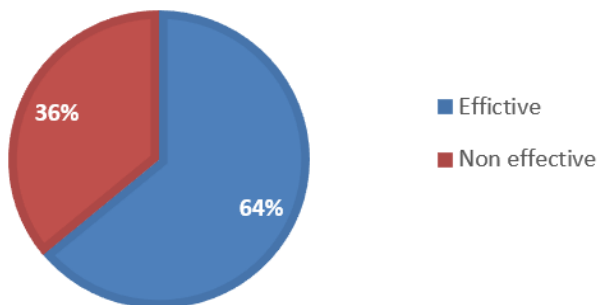
Terminology used	Meaning
Soft skills	How to treat people depending on the background and taking care of people.
Efficiency	Management processes, time management, conflict resolution, teamwork, management aptitudes...
Knowledge	Non-academic expertise, achievement recognition...
Interpersonal skills	Steps to carry out a research, research aptitudes...

Therefore, it is possible to observe that there are differences on the aspects that should consider in the generational handover of the three areas of scholars' duty. Even if there were differences on the competences that should be transferred on the three areas, there were two transversal competences in the three activities 8 which were interpersonal skills and knowledge.

In terms of the second research question, the results showed us that 64% of the participants consider effective the knowledge transfer strategies used on their institution, whereas the 36% consider non-effective the strategies used for their generational handover on their institution.

Figure 4 Effectiveness of the knowledge transfer strategies

Measuring the effectiveness of the knowledge transfer strategies



6. DISCUSSION

Even if the results seemed to be positive in terms of the effectiveness of the knowledge transfer strategies in the higher education institutions, further improvement should be done to obtain better generational handover processes. This study shows the importance of the role of the competences in the higher education institutions as the identification of these abilities help the improving knowledge transfer strategies. Different aspects such as specific skills, knowledge and resources should be considered part of the succession plans to complete successful generational handover processes.

Focusing on what actual professionals consider essential to transfer on their generational handover processes could help institutions improve their knowledge retention and, therefore, be more competent in the labour market. The care of the retirees and their knowledge in higher education is essential to have a bidirectional contentment (Crow, 2021). Thus, more strategies should be created to support generational handover in higher education focusing on the needs and perspectives of professionals (Hall-Ellis, 2015).

The results obtained on this research could help improve the quality of the retirements of the professionals on higher education. Having more personalised and centred generational handover processes improves maintaining knowledge on the organisations (Appelbaum, 2012). Different studies show that active listening on succession plans as well as generational handover processes can generate fulfilment on a personal and professional level to the individuals that are about to get retired (Perry & Parikh, 2018).

Some of the limitations of this research is the size of the sample, it would be interesting having a bigger number of participants in order to have more perspectives to analyze the results. Also, this research just considers former and active employees of one higher education institutions therefore, it would be interesting having more institutions of different characteristic participating on the study. The participation of different type of higher education institutions would give opportunity to analyse the

similarities and differences of strategies used for knowledge retention and knowledge transfer depending on corporates 9 characteristics.

7. CONCLUSION

This research plays a pioneering role on the contribution of the understanding of the current situation on knowledge transfer on higher education institutions when it comes to retirements. Indeed, it gives a wider perspective of how active and already retired professional understand the knowledge loss on higher education and the impact of that on organizations' competitiveness. This study underlines the importance of the succession plans and generational handover processes for the prosperity of higher education institutions.

This study gives an accurate picture of which are the new challenges for higher education in terms of knowledge transfer. It highlights the need to identify and transfer the competences of employees in generation handover processes. Likewise, this research gives us a better understanding of the situation of knowledge transfer strategies in the higher educational organizations. Indeed, this study identifies which are the most necessary competences of employees to transfer on generational handover processes.

This research gives us indications of the characteristics of the competences that an employee that is about to get retired should transfer to the employees that would replace him/her. Thus, this research has allowed us to identify which is the state of the efficiency of the current generational handover processes on the higher education institutions. Results show that generational handover processes can be improved in this sector. Future lines of research are suggested to have a better understanding of the reality of higher education institutions in order to create more efficient knowledge retention strategies and to define more competent knowledge transfer processes. In conclusion, this study is a step forward on the research of knowledge management that improves on the quality of the generational handover processes. The contribution of this study could improve the competitiveness and effectiveness of the companies as well as the market position of the organization.

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