TALENT MANAGEMENT LEADERS’ STRATEGIES FOR MILLENNIAL SENIOR
LEADERSHIP ROLES: A QUALITATIVE EXPLORATORY SINGLE CASE STUDY

by

Jayco D. McCowan

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TALENT MANAGEMENT LEADERS' STRATEGIES FOR MILLENNIAL SENIOR LEADERSHIP ROLES: A QUALITATIVE EXPLORATORY SINGLE CASE STUDY

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ABSTRACT

Organizations will face leadership gaps due to the increasing volume of Millennials entering in the workplace, combined with the scarce representation of Generation X, and the growth of retiring Traditionalist and Baby Boomers. The purpose of this qualitative exploratory single case study was to investigate strategies healthcare talent management (TM) leaders have in place to advance Millennials to senior leadership positions. The study involved analyzing data regarding leadership strategies for Millennial advancement from 11 TM leaders, who were employed by a non-profit public healthcare organization in the Houston, Texas metro area. Participant data were acquired through semi-structured interviews, HR literature, and the review of company strategies for succession planning. Three themes and two sub-themes emerged in support of three research questions. The overarching research question for this qualitative exploratory single case study was: What strategies do non-profit healthcare TM leaders use for Millennial advancement to senior leadership roles? The two sub-research questions were: How do non-profit healthcare TM leaders develop strategies to advance Millennials to senior leadership roles in healthcare systems? How do non-profit healthcare TM leaders identify barriers that affect prioritizing implementation strategies to advance Millennials to senior leadership roles in healthcare systems? Study findings confirmed there were no formal healthcare TM strategies or a succession plan in place to advance Millennials to senior leadership roles.
DEDICATION

I dedicate this dissertation to my children, Christopher James (CJ) and Jordyn Christina (JoJo); mommy wants you to know that you can do whatever you set your mind to if there is action behind it. No matter how long it takes to do something you are passionate about, no matter the challenges, NEVER give up and keep going. You both are the heartbeat of my doctoral journey and mommy loves you. To my husband, Aunt Linda, Nana, dad, and Tamikia G., thank you for being my rock during this long journey; I love you all. I could not have done this without your support and faith. To the Hatch and McCowan family, it takes a village, thank you for believing in me, rest in purpose Taylor Angelle. To my grandpa and grandma, I know you both were looking down and cheering me on. To my mother, you have been my biggest supporter of all, and you always see the best in me no matter what; I love you to the moon and back. Lastly, I dedicate this to all the doctoral students that are trying to push through the journey; do not give up. Nothing worth having comes easy and going through this journey will make you stronger in the end!
ACKNOWLEDGMENTS

I would like to first acknowledge God, thank you for getting me through! I was tested with so many challenges, but it was my faith in you that pushed me to keep going. Thanks to my work family and director, Ms. Melissa E, for supporting me during this journey and for keeping me in high spirits. To my chair Dr. Ballaro, you are a blessing; I appreciate your guidance and your encouragement in ensuring I did my best. To my committee members, Dr. Overbey and Dr. Underdahl, thank you for taking the time out to pay it forward, it meant a lot! Thank you to the organizational leadership where this study was conducted for giving me an opportunity. And finally, thank you to my cohort, especially Joy! We pushed each other throughout our journeys; it was a bumpy road, but we continued to motivate each other; I am forever grateful.
TABLE OF CONTENTS

Contents.............................................................................................................................................Page
List of Tables .................................................................................................................................. ix
List of Figures .................................................................................................................................... x
Chapter 1: Introduction .................................................................................................................... 1
  Background of the Problem ........................................................................................................... 2
  Problem Statement ....................................................................................................................... 5
  Purpose of the Study ..................................................................................................................... 6
  Population and Sample ................................................................................................................. 7
  Significance of the Study .............................................................................................................. 8
  Nature of the Study ....................................................................................................................... 8
  Research Questions ..................................................................................................................... 11
  Conceptual Framework .............................................................................................................. 11
  Definition of Terms ..................................................................................................................... 14
  Assumptions ................................................................................................................................ 15
  Limitations .................................................................................................................................... 15
  Delimitations ............................................................................................................................... 16
  Chapter Summary ....................................................................................................................... 17
Chapter 2: Literature Review ......................................................................................................... 18
  Title Searches and Documentation ............................................................................................ 19
  Historical Content ....................................................................................................................... 20
  Current Content ........................................................................................................................... 31
  Conceptual Framework Literature .............................................................................................. 40
<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Research Methodology</td>
<td>50</td>
</tr>
<tr>
<td></td>
<td>Research Method and Design Appropriateness</td>
<td>50</td>
</tr>
<tr>
<td></td>
<td>Research Questions</td>
<td>53</td>
</tr>
<tr>
<td></td>
<td>Population and Sample</td>
<td>54</td>
</tr>
<tr>
<td></td>
<td>Informed Consent and Confidentiality</td>
<td>55</td>
</tr>
<tr>
<td></td>
<td>Instrumentation</td>
<td>57</td>
</tr>
<tr>
<td></td>
<td>Field Test</td>
<td>58</td>
</tr>
<tr>
<td></td>
<td>Credibility and Transferability</td>
<td>59</td>
</tr>
<tr>
<td>4</td>
<td>Analysis and Results</td>
<td>65</td>
</tr>
<tr>
<td></td>
<td>Research Questions</td>
<td>65</td>
</tr>
<tr>
<td></td>
<td>Data Collection</td>
<td>66</td>
</tr>
<tr>
<td></td>
<td>Demographics</td>
<td>67</td>
</tr>
<tr>
<td></td>
<td>Data Analysis</td>
<td>69</td>
</tr>
<tr>
<td></td>
<td>Results</td>
<td>71</td>
</tr>
<tr>
<td></td>
<td>Chapter Summary</td>
<td>77</td>
</tr>
</tbody>
</table>
LIST OF TABLES

Table 1: Generations in the Workplace ................................................................. 3
Table 2: Totals Articles, Research Documents and Journals.................................20
Table 3: Instrumentation......................................................................................58
Table 4: Participant Demographics.................................................................68
Table 5: Final Themes ......................................................................................72
Table 6: Recommendations .............................................................................85
LIST OF FIGURES

Figure 1: Conceptual Framework ................................................................. 12
Figure 2: Precodes from NVivo ................................................................. 62
Figure 3: Word Cloud ................................................................. 67
Figure 4: Participant Breakdown ................................................................. 68
Figure 5: Participants by Title ................................................................. 69
Chapter 1

Introduction

In the next 40 years, Millennials will dominate the workforce (Moon, 2014). Since entering the workforce in the early 21st century, the 83+ million Generation Y (Millennials) has made an impression on organizational predecessors (Ferri-Reed, 2015). In a 2017 study conducted by Pew Research Center, more than one-in-three, United States workers are Millennials (Pew Research Center, 2018) and by 2020, Millennials will have more than 164 million workers in the workforce representing nearly 50% of the United States workforce (Ferri-Reed, 2015). Baby Boomers born in 1946 reached full retirement age in 2012 and in 2024, many Baby Boomers will have already exited the workforce (Toossi, 2015). With the retirement of Baby Boomers, the next two generations are left to carry the torch. In this study, the focus is on Millennials’ advancement to leadership positions. Brack (2012) emphasized that organizations will face leadership gaps due to the increasing volume of Millennials entering in the workplace, combined with the scarce representation of Generation X, and the growth of retiring Traditionalist and Baby Boomers.

As organizations transition through generational shifts, the preparation of Millennials for senior leadership roles is imperative for organizational sustainability. Many leaders still believe successful leaders are born with leadership skills and try to search for leaders externally; however, with appropriate talent development, cultivating leaders from within can produce the most effective future leaders (Collins & Collins, 2007; OPM, 2019). In healthcare, leaders must develop strategies to transfer knowledge from veteran employees to neophyte employees (Myers & Dreachslin, 2007).
Knowledge transfers through career development processes and strategies are vital as organizations focus on making an influential impact for the future (Thompson, 2013). Strategies for Millennial leadership development to senior leadership roles, fall under the Human Resources (HR) umbrella of Talent Management (TM) specifically aligned to the training and development (T&D) component. There is limited research on strategies that can effectively respond to the generational shift (Cahill & Sedrak, 2012). However, forward-thinking healthcare TM leaders who improve their awareness and develop strategies to advance the next generation of senior leaders, could enhance organizational performance and sustainability for the future.

Chapter 1 provides a brief introduction of the study that highlights the background, problem statement, and purpose statement. Additional content that set the foundation for the study include the significance of the study, nature of the study, and conceptual framework. Discussed in this chapter are the definitions, nature of the study, assumptions, limitations, and delimitations for a thorough appreciation of the study.

**Background of the Problem**

Westerman and Yamamura (2007) posited that as generations shift, organizations are influenced by the values and preferences of the next successors. Four main generations made up the workforce (Gursoy, Maier, & Chi, 2008). However, Generation Z has entered the workforce increasing the number from four to five generations (Bencsik, Horváth-Csikós, & Juhász, 2016). Table 1 depicts year ranges for the five workforce generations.
Table 1

*Workforce Generations*

<table>
<thead>
<tr>
<th>Generation Name</th>
<th>Date of Birth Year Ranges</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Traditionalist “Veterans”</td>
<td>Born before 1946</td>
</tr>
<tr>
<td>2. Baby Boomers “Boomers”</td>
<td>1946-1964</td>
</tr>
<tr>
<td>5. Generation Z “Gen 2020”</td>
<td>Born after 1997- until (to be determined)</td>
</tr>
</tbody>
</table>


Millennials have influenced how organizations engage their internal and external stakeholders by defining the way businesses approach industry positioning and organizational strategies (Huyler, Ding, Norelus, & Pierre, 2015). By 2030, 77 million Millennials will make up 75% of the workplace (Burgess-Wilkerson et al., 2018; Fry, 2018). The evolution of Millennials in the workforce has sparked interest in understanding how to manage and retain Millennials (Moon, 2014). However, Millennials have transitioned into roles that require a level of preparedness as future leaders (McDonald & Hite, 2008). Growing up in the age of technology, Millennials have adopted innovative and creative skills that could position organizations to achieve competitive advantage and sustainability (Moon, 2014). As Baby Boomers prepare for retirement, industry leaders must incorporate strategies that groom the younger generation to carry on their organization’s legacy. Knowledge sharing is essential when
closing the gap and taking steps towards making sure that an organization is left standing for years to come (McDonald & Hite, 2008).

Some Millennials seek professional development because they know that acquiring knowledge will help them advance in their careers (Alsop, 2008). However, if Millennials perceive their expectations are not being met professionally, they have no problem changing careers (Ng, Schweitzer, & Lyons, 2010). Millennials need to be part of the forward-thinking process and may find another position if they feel disengaged (Huyler, Ding, Norelus, & Pierre, 2015). On an average, Millennials change jobs every two years which concerns business leaders (Alsop, 2008). Some Millennials change jobs due to the lack of opportunities for leadership advancement and development (Ng et al., 2010). According to a study conducted by Ng et al. (2010), career advancement opportunities were a top priority for Millennials. The ambition for the next generation of leaders is present (Ng et al., 2010). Industry leaders must take the initiative to embrace Millennial talent by implementing strategies for Millennial advancement to senior leadership positions.

Due to the constant change in the healthcare industry, the need for strong leaders is vital to the state of healthcare systems (McAlearney, 2010). Leaders should implement strategies that advance future leaders to preserve the mission and vision of the organization (McAlearney, 2010). A successful healthcare leadership strategy goes beyond developing lower-level leaders (team leads, supervisors, entry managers), but enhances one’s knowledge to executive-level concepts (McAlearney, 2010). According to the Fair Labor and Standards Act, an individual must be at least 14 years of age to work in the United States (United States Department of Labor, 2017); which indicates
that some Millennials are already in their 40’s with over 20 years’ of work experience, according to the earliest recorded Millennial generation starting year-1977 (McDowell, 2000; Meister & Willyerd, 2010; OPM, 2019; Stark & Flaherty, 1999). Consequently, even though Millennials entered the workplace over 20 years ago, some Millennials still feel they lack leadership development opportunities (Deloitte, 2016). In a Deloitte Study (2016), the results showed that six out of 10 Millennials expressed that their leadership skills were not being developed. Many Millennials believe that organizations are not bridging the gap in developing a new generation of leaders. A lack of succession planning strategies for leadership advancement may cause healthcare organizations to have a significant risk of increased employee turnover throughout the years. Low priority in leadership development is the reason 71% of Millennials leave their companies within two years (Deloitte, 2016). These findings show a clear indication that organizational leaders are slothful in developing Millennials as the next generation of senior leaders.

**Problem Statement**

The specific problem is despite the potential gap in filling leadership positions; some healthcare TM leaders have not implemented strategies for Millennial advancement to senior leadership positions (Development Dimensions International, 2015). Some leaders run the risk of their organization being incapable of meeting strategic planning goals and long-term sustainability due to the scarce Millennial representation in senior leadership roles. A 2015 trend study conducted by Development Dimensions International’s (DDI) Analytics and Behavioral Research discovered that organizations with a low number of Millennials in senior leadership roles showed low organization growth of 21% versus a 30% growth with a greater Millennial leadership representation.
Pew Research (2018) stated every one-in-three workers are Millennials; yet only about 15% occupy management roles (Development Dimensions International, 2015). Industry leaders must understand the validity of implementing strategies to advance Millennials to senior leadership roles and avoid potential leadership gaps that can threaten organizational sustainability.

Although some healthcare leaders understand the need for preparing the next generation of leaders, the efforts to incorporate strategies for advancing Millennials are reactive (Collins & Collins, 2007). Due to the increase of retiring Baby Boomers, a scarce representation of Generation X, and some Millennials entering the workforce with no leadership development opportunities, organizations run the risk of giving up their competitive position (Development Dimensions International, 2015). In the next five years, 84% of organizations expect a shortfall in qualified leaders (Development Dimensions International, 2015). Collins and Collins (2007) stated that healthcare organizations are not placing emphasis on fostering the next generation of leaders to increase organizational sustainability. TM leaders could fail the organization and community by not implementing strategies to advance Millennials in senior leadership roles.

**Purpose of the Study**

The purpose of this qualitative exploratory single case study was to investigate strategies, healthcare TM leaders currently have in place to advance Millennials to senior leadership positions in the Houston, Texas metro area. Despite the generational shift and retirement of senior leaders, many healthcare leaders have not made it a priority to develop a succession plan to advance successors in filling gaps in leadership (Collins &
Collins, 2007). Millennials have the desire to advance to leadership positions (Deloitte, 2016), but some organizations may lack the will and guidance needed to implement senior leadership advancement strategies for Millennials. Exploring current leadership development and advancement strategies healthcare TM leaders implement may assist other healthcare and business leaders struggling with developing and implementing strategies for Millennial advancement to senior leadership roles. Croteau and Wolk (2010) stated that leaders need to think strategically about building a pipeline for future leaders instead of letting talent walk out the door. In some cases, if Millennials feel that their career path to leadership is not being developed, organizations will continue to endure Millennial turnover further increasing the leadership gap.

**Population and Sample**

The population for this qualitative exploratory single case study included TM leaders from a public non-profit healthcare system in the Houston, Texas metro area. The Houston, Texas metro area is home to some of the best hospitals and medical research in the world (Texas Medical Center, 2017). The TM leaders from one of the public non-profit healthcare systems in the Houston, Texas metro area, understood leadership advancement strategies and leadership development strategies. The sampling technique used for this qualitative case study was purposive sampling. Purposive sampling is a nonrandom technique the researcher implements when potential participants need to have knowledge and experience relating to the study (Etikan & Bala, 2017). This sampling technique established parameters to ensure that participants fit the criteria of the study. To qualify for this study, participants had to have served in leadership position for five years or more, currently hold one of the following or similar titles—senior executive,
management consultant, senior manager, division director, executive director, senior
director, AVP, VP, SVP, chief officer, and/or a board of director member, and have TM
responsibility in the current role. A sample of 11 participants were selected. Interviews
continued until saturation occurred. Saturation occurred at the ninth interview; however,
two additional interviews were conducted to ensure no new information was provided.

**Significance of the Study**

The study was significant for identifying strategies to help tackle succession
planning aligned to leadership development of Millennials for executive roles. Moreover,
this study could support healthcare leaders with a roadmap to prepare the next generation
of organizational executives. There was scarce research on how to prepare Millennials
for senior leadership roles in non-profit healthcare systems that the findings in this study
filled. Organizations are going through a generational shift and will be at the mercy of
Millennials (Nolan, 2015). While it is easy to ignore the growing needs and requirements
of the Millennial generation, organizations need to stay competitive in their HR strategy
(Nolan, 2015). Current and future leaders can benefit from this study by placing a high
emphasis on leadership development and succession planning for Millennials.

**Nature of the Study**

A qualitative approach was the chosen research methodology for this study. The
qualitative research method is appropriate when a researcher seeks to obtain an
understanding of human thinking and reasoning. For the goal of this study, the researcher
intended to gain insight from TM leaders in a healthcare organization to explore
leadership development and advancement strategies. According to Baker (2006),
qualitative research involves an investigation of perspectives through interviews,
observations, and verbal interactions. A qualitative research design allows the researcher to gage the participant’s perspectives on a topic to develop in-depth knowledge of the phenomenon that is being investigated (Algozzine & Hancock, 2017). The goal of exploring TM leadership strategies for the advancement of Millennials to senior leadership roles was appropriate for a qualitative method.

To explore current strategies TM healthcare leaders, implement to advance Millennials to senior leadership roles in a public non-profit healthcare system, a case study was the chosen research design. Case studies explore a phenomenon through various lenses that uncover multiple facets to engage audience understanding (Baxter & Jack, 2008). Case studies facilitate the exploration of a phenomenon from dissimilar resources ensuring the phenomenon is understood through diverse perceptions (Baxter & Jack, 2008). There are different types of qualitative case studies such as single and multiple case studies (Baxter & Jack, 2008). For this research, a single case study was conducted to focus on quality discovery and observation time regarding TM strategies within a single location. A single case study analyzes and describes a case in a single context (Yin, 2013). The researcher for this study interviewed TM healthcare leaders in a single context, which deflated the usage of a multiple case design.

The exploratory component added to a single case study grants the researcher an opportunity to explore situations in which the case has no clear outcome (Yin, 2003). The approach of a phenomenological study is tailored to the lived experiences of humans. Yates and Leggett (2016) asserted that phenomenology focuses on the shared human lived experiences of a certain phenomenon to uncover shared meaning and perspectives. In this study, lived experiences of participants were not being investigated. The
grounded theory is an approach to formulate a theory through an iterative process (Yates & Leggett, 2016). To obtain data, the researcher perambulates in the field, to the natural setting in which participants live or work (Yates & Leggett, 2016). This approach was disregarded because the goal of this study was not to develop a new theory, but to explore TM strategies already in place within a non-profit healthcare system.

The purpose of this qualitative exploratory single case study was to investigate strategies, healthcare TM leaders currently have in place to advance Millennials to senior leadership positions in the Houston, Texas metro area. Data collection in qualitative case studies are multifarious and interchangeable depending on the goal of the study (Gill, Stewart, Treasure, & Chadwick, 2008). Examples of data collection include interviews, observations, textual or visual analysis, and focus groups (Gill et al., 2008). In this study, interviews, HR literature, and a succession plan were used for data collection. According to Kvale and Brinkmann (2009), the research interview is an interpersonal conversation between two partners about a theme of mutual interest. Interviews for this study were conducted via face-to-face or through phone conferencing. All interviews were recorded to enhance member checking and capture detailed responses. Participant interviews consisted of nine interview questions (IQs) and was recorded by the researcher with permission. The interviews were semi-structured with an agreed date and time between the researcher and study participant. Informed consent documents were issued to participants prior to interviews displaying the expectations of the study and the interview. The researcher asked nine IQs for in-depth empirical information for rigorous data to provide support to the research questions.
Research Questions

While conducting this qualitative exploratory single case study, the researcher sought to investigate what strategies TM healthcare leaders were implementing to advance Millennials to senior leadership roles. The overarching research question for this qualitative case study was: What strategies do non-profit healthcare TM leaders use for Millennial advancement to senior leadership roles? To explore the main question, the sub-questions were:

RQ1. How do non-profit healthcare TM leaders develop strategies to advance Millennials to senior leadership roles in healthcare systems?

RQ2. How do non-profit healthcare TM leaders identify barriers that affect prioritizing implementation strategies to advance Millennials to senior leadership roles in healthcare systems?

Conceptual Framework

Frameworks for research studies form the foundation of the study. Theoretical and conceptual frameworks are the linkage to a strong base that guides a study. Theoretical framework identifies at least one theory that is empirical to research by providing reference and knowledge on how a study was developed (Flick, 2014). Rocco and Plakhotnik (2009) asserted that the conceptual framework is guided by theory (ies) and concept (s) that are essential to a study. Knowledge of historical theories and ideas common to the subject advances one's understanding through analysis that develop independent conclusions (Hart, 1998). Three theories were identified for this study to include: Human Capital, Generational Theory, and Authentic Leadership Theory. All three theories were significant in understanding the importance of developing strategies
to prepare Millennial for senior leadership roles in healthcare systems. When the above theories are combined, the output is Millennial leadership development for advancement which produces organizational sustainability and competitive advantage. An illustration of the conceptual framework is displayed in Figure 1.

*Figure 1. Conceptual framework for the qualitative case study that illustrates the foundation of the study.*

Combining the Human Capital, Generational Theory, and Authentic Leadership Theory support Millennial leadership development for advancement that can lead to organizational sustainability and competitive advantage.

**Theories**

**Human capital theory.** The human capital theory suggests that there are gains to investing in people (Becker, 1962; Schultz, 1961; Sweetland, 1996). Investment in the workforce to enhance human skill and talent represents the general term of human capital (Olaniyan & Okemakinde, 2008). As it relates to human capital theory, the new
generation must be given knowledge from the previous generation to develop innovative processes, production methods, and services (Babalola, 2003; Olaniyan & Okemakinde, 2008).

**Generational theory.** The concept of generations dates to sociologist, Karl Mannheim (1893-1947). Karl Mannheim wrote a paper entitled *The Problem of Generations* where he discussed the importance of generational succession and understanding common generational influences deriving from intellectual, social, and political circumstances (Mannheim, 1952). Mannheim (1952) declared the term generation as the expression of unity concerning how individuals view the world and life during a certain time period. This theory is essential in understanding generations and approaches organizational leaders take in developing Millennials to senior leadership roles.

**Authentic leadership theory.** George (2003) coined the term and stated that authentic leadership embraces purpose, values, and integrity that is inherited from a predecessor. Kernis and Goldman (2006), emphasized that authentic leadership is being true to oneself through awareness, unbiased processing, behavior, and rational orientation. Authentic leadership is transparent and cripples the hoarding of information to followers (Luthans, Norman, & Hughes, 2006). Providing hope and encouragement to through authentic leadership, could provide Millennials with resources for support in leadership transition.
Definition of Terms

The premise of providing definitions for this study serves as a guide to yield clarity to the reader. This glossary includes a general understanding of terms use throughout the study. Terms used within this document are listed below for extensive understanding.

*Generation* includes individuals that share a common location aligned to social and historical processes that would limit them to a certain age range (Mannheim, 1952).

*Healthcare Systems (Health System; HS)* are comprised with organizations, institutions, and resources that are devoted to producing health actions and resources (World Health Organization, 2000).

*Non-profit organization* are barred from distributing net earnings to individuals that a have control over them (Morris, 2000).

*Talent Management (TM)* is a multi-faceted concept that is comprised of employee recruitment, retention, development, and succession practices that assist organizations with competitive advantage and sustainability (Christensen Hughes & Rog, 2008).

*Training and Development (T&D)* aids organizations in their efforts to enhance competitive advantage by educating their workforce (Salas, Tannenbaum, Kraiger, & Smith-Jentsch, 2012).
Assumptions, Limitations, and Delimitations

Boundaries of a study are significant to assist in the structure of a study. While conducting a study, it is critical for the researcher to reflect on potential outcomes that can affect the process (Theofanidis, & Fountouki, 2018). Researchers utilize assumptions, limitations, and delimitations to help frame the study. By implementing this practice, the researcher was accountable for focusing on specific areas to limit deviations. In this section, the above terms are explained in detail.

Assumptions

Beliefs in research that cannot be proven but are essential to the trajectory of the research are called assumptions (Simon & Goes, 2013). This qualitative exploratory single case study was designed in terms of assumption that the preparation of Millennial transition into leadership roles could increase organizational sustainability. Another assumption was that if more healthcare leaders were accountable for strategies to advance Millennials into leadership roles, those leadership strategies would bridge the gap in leadership shortages. The last assumption to note involved the understanding that enhancing leadership development strategies for Millennials is a low priority to some healthcare leaders. In hindsight, if healthcare TM leaders would place leadership development strategies as a top priority; the retention of Millennials, organizational sustainability, and competitive advantage would increase.

Limitations

One limitation was the lack of participation from executive leaders. While the researcher interviewed some executives, scheduling made it difficult to interview majority of the executives. Another limitation was the lack of participation from HR; the
researcher had to seek leaders with TM responsibilities outside of HR. This was a direct result of minimal responses to participate in this study. The researcher had no control over HR participation. Lastly, the perspective was limited to one organization in the Houston, Texas metro area. While the organization is one of the largest healthcare systems in the area, data were derived only from one service location that related specifically to that organization and cannot be generalized to all other organizations.

**Delimitations**

Creswell (2008) suggested that delimitations set researcher boundaries and further narrows the scope. The delimited component of this qualitative exploratory single case study was the participant focus of healthcare TM leaders from the public non-profit sector of healthcare systems. The study aimed to choose a public non-profit organization due to higher healthcare industry representation. Another delimitation was the chosen study location, Houston, Texas metro area. This location does not represent the United States in its entirety but could still provide insight on leadership strategies for Millennial advancement. Lastly, delimitation was present with the chosen generation year frame presented in Table 1. There are slight differences in the years that span from each cohort and naming conventions (Salahuddin, 2010). The researcher used the earliest known year for all generations as a guide from Meister and Willyerd, 2010, *The 2020 Workplace: How Innovative Companies Attract, Develop, and Keep Tomorrow's Employees today.*
Chapter Summary

Collins and Collins (2007) believed that there would be a labor crisis in the next few years due to the increase number of retiring executives. Preparation of the next generation of leaders is vital and Millennials play a critical role in healthcare organizations. The need for strategies to advance Millennials to senior leadership positions are necessary as they continue to grow in the workforce and dominate organizations. Millennials will saturate the workforce with approximately 50% of workers in 2020 (Ferri-Reed, 2015; Lynch, 2008).

The researcher illustrated the significance of understanding the problem background which led to the general and specific problem, purpose, and RQs. A qualitative exploratory single case study was chosen for this research to investigate current strategies healthcare TM leaders implement to advance Millennials to senior leadership roles. Subsequently, the conceptual framework that served as a foundation for this study was highlighted. Rocco and Plakhotnik (2009) emphasized that the conceptual framework is guided by theories and concepts. Theories that constituted the conceptual framework were the human capital theory, authentic leadership theory, and generational theory. The researcher exhibited definitions to assist the reader with terms that were used throughout the study. Reflection was vital for the researcher to combat outcomes that could affect the study. Chapter 1 set the tone for Chapter 2 to examine literature and literature gaps aligned to this study. To further enhance one’s knowledge on the research topic, an in-depth literature review surrounding the study is provided in Chapter 2.
Chapter 2
Literature Review

Previous scholarly and peer-reviewed content pertaining to TM leaders’ strategies to advance Millennials to senior leadership positions are presented in Chapter 2. The conceptual framework served as the study’s foundation to include the human capital theory, generational theory, and the authentic theory. However, to move the research forward, the researcher needed to understand what was present in the body of knowledge as it related to this study. The goal of conducting this literature review was to examine and identify literature that correlated to the study and uncover literature gaps to support why this research was needed. More importantly, a literature review advances the researcher’s collective understanding of previous research to enhance the quality of the research study (Boote & Beile, 2005).

A researcher cannot be a subject matter expert in their field without thoroughly understanding the literature surrounding the study (Boote & Beile, 2005). For this study to be valuable, it must build upon previous knowledge to expand the body of knowledge (Hart, 1998). Literature review was the basis for why this qualitative case study delved to uncover available information regarding TM strategies for Millennial development and advancement. Study search document review, historical content, current content, an expansion of the conceptual framework to include the study’s theories, methodology, and research design literature were evaluated in this chapter to expand the researcher’s understanding of the topic to conduct a thorough study.
Title Searches and Documentation

Uncovering and describing relevant research literature enhances support for the importance of a study and mastery of the chosen topic (Yin, 2013). Providing an effective literature review contributes to theoretical development, highlight literature closely related to the topic, and uncover areas where research is needed (Webster & Watson, 2002). While conducting this literature review, the researcher identified gaps in research and built concept relationships for the study. In order to detect the gaps in research, an examination of past research that exposes discrepancies between what is known and what needs to be discovered, alerts the researcher on what should be executed (Webster & Watson, 2002).

The researched literature came from resources using Google Scholar and the University of Phoenix library database to include: ProQuest, EBCOHOST, ABI/Inform, SAGE Journals, JSTOR, and Journal of Leadership Studies. Implementing a systematic approach ensures a concise and through census of relevant literature for a qualitative case study (Webster & Watson, 2002). Conducting research from databases, keywords, and concepts relevant to the topic were administered along with field features to ensure research alignment. Table 2 contains information regarding the research conducted for this study.
Table 2

Totals Articles, Research Documents and Journals

<table>
<thead>
<tr>
<th>Type of Resource</th>
<th>Number of Total Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peer-Reviewed Articles</td>
<td>36</td>
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Historical Content

In this section, historical contents linked to the study were examined. The researcher performed a literature review for content over five years to outline how past intentions and events were related to the topic. Reviewing past literature enhances the researcher’s knowledge on the historical background to increase knowledge and effective synthesis of previous literature (Law et al., 1998). The following topics are covered in this section: generations, Millennials, TM, multigenerational workforce, succession planning, and healthcare systems.

Generations

Understanding what constitutes a specific generation can be a challenge due to the various year ranges researchers define as a generation (Salahuddin, 2010). While there are different year ranges for the five generations in this study, the researcher adopted the
generational years provided by Meister and Willyerd, (2010). To gain a comprehensive understanding of generations, it is important for the history of generations be examined. The concept of generations dates to sociologist, Karl Mannheim (1893-1947). Mannheim (1952), identified that understanding generations is the indispensable guide to social and intellectual moments. Generations are like cliques with distinct characteristics that form a group of individuals who are aligned to a specific generation (Mannheim, 1952). To explain generational differences, Mannheim (1952) emphasized that many generational theorists try to set generational intervals through a class of birth at no more than thirty years and a trigger action of social/cultural changes to the critical points in historical chronology. On the contrary, theorist Norman Ryder (1965) expressed the explanation of generations as a cohort in his *The Cohort as a Concept in the Study of Social Change.*

**Concept in the study of social change literature.** Ryder (1965) noted that “there is a difference between a cohort and generation; generation should be used solely in its original and unambiguous meaning as the temporal unit of kinship structure” (p. 853). Building on theorist Karl Mannheim’s (1952) explanation of generations, Schuman and Scott (1989) agreed that each generation receives a distinctive imprint from a social and political perspective; however, they expressed the need for further detail on identifying generations. Schuman and Scott (1989) administered a study that identified collective political and societal memories in American history among individuals in different age ranges that are identified by a cohort i.e. a generation. Schuman and Scott (1989) noted, it is vital to understand that an individual and social groups’ perspective to a major event is a crucial element of future actions. Schuman and Scott (1989) stressed
that generations are defined as an age cohort that shares unique years and experiences within the first 20 to 23 years of life that shape one’s perspective and value.

Depending on the theorist or subject matter expert, generation ranges can vary. Generations are identified by different names and dates; in this study certain names and dates are utilized. The researcher used the following: Traditionalist (born before 1946), Baby Boomers (1946-1964), Generation X (1965-1976), Millennials (1977-1997), and Generation Z (born after 1997); these ideal generational timeframes are acknowledged by several researchers (Cudmore et al., 2010; Meister & Willyerd, 2010; Nowak et al., 2006). In contrast, other date ranges are utilized that are slightly different by one to four years. Howe and Strauss (2007) claimed that based on historical precedents, one can predict the generations, and how generations think and act. Understanding these generations can be beneficial when understanding how to embrace the rise of a multigenerational workforce. A detailed generalization of the generations is listed below.

**Traditionalist.** This generation known also as the “Silent Generation” and are known as the children of the Great Depression (DelCampo, Haggerty, & Haney, 2010). Traditionalist are called the Silent Generation because they bottle up their emotion (DelCampo et al., 2010). They are very conservative, loyal, disciplined, and believe in respecting authority (DelCampo et al., 2010). In the workplace, Traditionalist believe that employees work hard and climb the corporate ladder based off tenure (Hannay & Fretwell, 2011; Lieber, 2010). Experience is in the workforce is significant to Traditionalist.
**Baby boomers.** Baby Boomers were the largest generation before the Millennials. In the 60s and 70s, Baby Boomers protested socially and politically; they believed in expression and having a voice in matters that concerned their wellbeing (DelCampo et al., 2010). This generation were the movers of the Women’s and Civil Rights Movement that compelled them to work hard and push forward no matter the adversity (DelCampo et al., 2010). Baby Boomers are hard-working, competitive, politically correct, and believe in core values (DelCampo et al., 2010). In the workplace, most people in this generation are workaholics with a serious dedication to work (Hannay & Fretwell, 2011).

**Generation X.** This generation is sandwiched between two larger generations making them the “middle child” (Hannay & Fretwell, 2011). This generation marks the period of birth decline after the Baby Boomers which explains why this cohort is smaller than preceding and succeeding generations (Kaifi, Nafei, Khanfar, & Kaifi, 2012). Arriving after the Baby Boomers, this generation did not want to emulate the workaholic lifestyle, so they embrace a work-life balance rather than tenure and work status (DelCampo et al., 2010). Generation X is the first to embrace technology in their professional and personal lifestyles (DelCampo et al., 2010). Generation X are independent, informal, reactive, entrepreneurial and distrust authority (DelCampo et al., 2010).

**Millennials.** This generation are educated, achievement oriented, and have integrated technology in every aspect of their lives (DelCampo et al., 2010). Millennials have invaded the academic world and continues to grow in the workplace (DelCampo et al., 2010). While this generation may job hop every few years, they yearn for
professional development in the workplace (Alsop, 2008). Millennials are tech savvy, racially/ethnically diverse, have pressure to succeed, and want instant gratitude (DelCampo et al., 2010).

**Generation Z.** This generation is the next cohort following the Millennials. While Generation Y and Z are often combined because they share many of the characteristics; however, Generation Z will show strong customer orientation due to their age during the economic recession (Wood, 2013). This generation has a strong comfort level with the virtual world which makes them highly innovative. This characteristic will be extremely important as times change in the world of technology and business. Generation Z started growing up in economically challenging times, so they feel strongly about having stability and security (Wood, 2013).

**Multigenerational Workforce**

A growing trend in the workforce is generational diversity. Understanding the landscape of employees from a generational perspective can help TM professionals recruit and retain employees. The increase of retiring Baby Boomers and entry of Millennials have made it imperative for leaders to learn about job satisfaction and commitment among employees (Kaifi et al., 2012). There was a prolongation where three generations operated the workforce and now with the addition of two generations (Millennials and Generation Z), organizations must change the way things were administered in the past to adjust with the market. The multigenerational shift may have a significant impact on organizational leaders and the success of an organization (Kaifi et al, 2012; Salahuddin, 2010). Leaders must leverage the expectations of each generation in the workforce to provide value toward generational traits, characteristics, strengths,
and weaknesses (DelCampo et al., 2010). Understanding how to manage a multigenerational workplace can assist in increasing the overall stability and achievement of the workforce.

**Millennials**

The Millennial generation has been one of the most researched generations in the world. Millennials are identified using time ranges from the late 1970’s to the mid 1990’s or by using the early 1980’s as a starting point for identifying Millennials. In this study, the researcher used the late 1970’s to the mid 1990’s to identify the Millennial generation. This range was used because during the late 70’s, birthrates increased for the first time in ten years (DelCampo et al., 2010). Millennials have been referred by many names to include: Generation Y, Generation Next, and iGeneration; however, the popular name is Millennials (Alsop, 2008).

While there are contrasting birth ranges and names, overall Millennials are making a historical impact in changing world views. Precedingly, Millennials had perceptions that were positive and negative that have followed them throughout the years. Alsop (2008) identified Millennials as trophy kids and found that Millennials were often arrogant, fickle, and narcissistic. Conversely, Alsop (2008) also found that Millennials are ambitious, innovative, and civic-minded. Howe and Strauss (2000) noted that Millennials will be a generation of trends that represent an opposite trait of Baby Boomers. The continuous rise of Millennials entering the workforce could change how businesses operate in the future; and organizations must be prepared.

**Millennials in the workforce.** The generational shift in the workplace have led organizations to support Millennials in different elements to achieve success. Because
Millennials have entered the workplace in massive numbers, organizational leaders must pay special attention to this generation and their needs as they prepare for the future (DelCampo et al., 2010). Millennials are generally perceived by older generations as arrogant and entitled; however, Millennials tend to be multitaskers, team-oriented, and philanthropic (Alsop, 2008). In his study, Alsop (2008) found that some individuals felt Millennials believed the workplace should adapt to their needs; 85% of managers from the study agreed to this notion. HR executives reported that Millennials have a stronger sense of entitlement then their experienced counterparts in the workplace (Alsop, 2018).

Millennials are taking over the workforce and they want to ensure their career is stable and professional development opportunities are provided. In Raines (2002) excerpt of Managing Millennials, she noted that Millennials want learning opportunities and need to be challenged through various projects to advance their growth (2012). DelCampo et al. (2010) stated that Millennials are technological savvy and information gatherers due to their exposure to the web. Millennials come into the workforce with more education and a sound background in understanding diversity in the workplace (Bannon et al., 2011). Bannon et al. (2011) highlights that Baby Boomers are approaching retirement age; it is important for employers to understand what motivates Millennials so they can retain them through the generational shift. Kuhl (2014) stated that while the generations may be alike then different, organizations must still prepare for transformation. Millennials are confident which contributes to why Millennials should be considered for leadership positions (Kuhl, 2014). Kuhl (2014) noted that due to the affluence of this generation, managers should adapt their leadership style to motivate and provide feedback to Millennials through acquired best practices.
Talent Management

Lewis and Heckman (2006) combined various definitions and defined TM as a collection of typical HR functions and activities that have an emphasis on areas consisting of recruitment, selection, development, and career succession planning. A key instrument in organizational development is employee development. Job performance expectations and the implementation of strategies that engage employees to reach their full potential are important elements of TM (Benham, 1993). Benham (1993) noted that employees need a support system consisting of education, training, and assignments. TM leaders carry the responsibility of making sure their team is providing a career roadmap to employees that want to eventually move into leadership roles.

Understanding the significance of a career path can meet the needs of employees who want more responsibility within the organization (Benham, 1993); this can assist with employee satisfaction and retention. TM is the architecture to HR and should be key to strategy and talent (Lewis & Heckman, 2006). One success factor for organizations is succession planning. Developing and managing the efforts of employees should be a major priority for TM leaders. TM is essential to the effectiveness of succession planning because TM leaders aid in the professional and career development path for the next generation of leaders.

Leadership Succession Planning

During succession planning, senior leaders specifically on presidential and c-suite levels, should play a role in formulating a plan to develop a pipeline (Benhan, 1993); TM leaders must provide support and guidance during this process. Organizations must be ready to fill key executive positions during a generational shift. Benhan (1993) indicated
the importance of identifying replacement candidates for key positions, determining readiness to assume more accountability, and developing strategic action plans for qualified candidates.

**Generations aligned to leadership development.** Generations serve as one component of diversity in the workplace which has received a lot of attention in recent years due the massive generational shift (Salahuddin, 2010). Keeping up with economic and technological changes in healthcare can be a challenge. An increase possibility that healthcare organizations could encounter a leadership gap amplifies the problem in healthcare (Collins & Collins, 2007). Different generational cohorts bring different sets of beliefs from shared collections of attitudes, preferences, and dispositions that can influence how leadership is perceived (Arsenault, 2004). Industry leaders must be aware of the various generations and how they learn (Barnes, Marateo, & Ferris, 2007). For example, the way a Baby Boomer learns could be totally opposite from how a Millennial learns. Some may argue that people adapt to the trends with age (Rood, 2011); however, shared years of birth and significant life events sets the foundation of how one develops (Mannheim, 1952). The erroneous belief is that individuals’ values and preferences tend to stable overtime with age, devalues the importance of understanding generations (Arsenault, 2004).

High regard for the impact generations have on organizations can create an environment of respect and joint efforts to reach organizational goals (Salahuddin, 2010). Salahuddin (2010) studied different leadership styles amongst four generations (Traditionalist, Baby Boomers, Generation X, and the Millennials) and the impact each generation had on organizational success. While the study showed similarities, there
were differences in leadership practices based on five open-ended questions and a checklist (Salahuddin, 2010). The results were consistent with previous literature that generational discordance was present in the workforce (Salahuddin, 2010). The dissimilarity in leadership style and leadership characteristics were uncovered placing emphasis on how generations are different as leaders (Salahuddin, 2010). While this study highlighted the incomparability in leadership style and characteristics, it did not demonstrate strategies that advance the different generations of leaders. As it relates to targeting individual generations, it did serve as a mechanism that leadership advancement strategies should incorporate a generational component for engaging generations.

Gentry, Griggs, Deal, and Mondore (2011) investigated leadership practices that were important to the ascendancy of an organization and identified the possibility of a skill gap among managers in three generational cohorts. The study had an insignificant number of Millennial management participation of 429 participants versus 3000+ from the Baby Boomers and Generation X (Gentry et al., 2011). The lack of Millennial representation was due to the scarce number of Millennials in leadership positions compared to the other generational cohorts (Gentry et al., 2011). Gentry’s et al. study showed similarities from previous studies, but their findings suggested gaps pertaining to Millennials whose focus is leadership development (2011). While there was a huge disproportional amount of Millennial participation numbers, the study did implicate the urgency for organizations to focus on the needs of each generation for career advancement in leadership.

The literature highlighted the differences in generations and their perspective on leadership. Historical studies yielded results that affirmed the need for a generational
focus on leadership development to better prepare the next generation of leaders. The literature supported the generational theory that served as one-of-three theories in this study endorsing leadership strategies for Millennial advancement to leadership positions.

**Healthcare Systems**

In the United States, changes and concerns that affect the healthcare industry are driven by rising costs, the failure to provide universal coverage, consumer dissatisfaction, and the increasing recognition of low life expectancy (Smith, 1997). Healthcare organizations must be prepared to mitigate challenges that can have a negative impact on the industry through adaptation. Healthcare systems are driven by social and cultural expectations of the citizens (Lameire, Joffe, & Wiedemann, 1999). No healthcare system is stable (Smith, 1997), organizational leaders must be aware of world shifts and adhere to adjustments to stay competitive. Lameire et al. (1999) asserted that healthcare systems are oppositional around the world because they are influenced by history, traditions, and political systems.

**Current Content**

The analyzation of historical literature allowed the researcher to cognize past content to better understand and competently seek current developments on the chosen research topic. In this section, the researcher examined literature related to the chosen topic that developed within the last five years. Transitioning from examining historical literature to current literature provides a snapshot aligned to the state of research (Pan, 2016).
Generations

Generations have been a topic for understanding characteristics of individuals born in a certain timeframe as noted by sociologist, Karl Mannheim (1893-1947). This topic continues to expand as other theorists and researchers explore how generations operate today in various capacities. Clark (2017) defined generations as a group of individuals born in a certain era, who share common knowledge and experiences that affect perspectives, behaviors, attitudes, beliefs, and values. Not all individuals in the same generation will exhibit all or some of the same characteristic; some individuals may display characteristics of another generation (Clark, 2017). Generational groups are general terms and do not apply to everyone but allow individuals to gage how people may respond depending on their given generational group. Each generation is subject to stereotypes that have emerged from some clear truths (Widén, Heinström, Österbacka, Ahmad & Huvila, 2016).

Campbell, Twenge, and Campbell (2017) provided a time frame for generations as 17-20 years in length and explained that the timeframe given was due partly to a biological perspective aligned to human maturity and reproductivity. Campbell et al. (2017) stated that generations are historically and economically explained by various past theorist contributing to how generations are formed and used today. However, Campbell et al. (2017) argued that identifying generations are fuzzy from a sociological and psychological perspective as it relates to clarity. Özçelik (2015) described a generation as a group sharing and facing key historical events during the same time and specific period in life. Each generation that experiences the same events during the same
timeframe will have similar values, worldviews, cultural ideologies, political perspectives, and economic experiences (Özçelik, 2015).

**Millennials**

Millennials are one of the most sought out generations because they are the largest group to arise since the Baby Boomers (Fry, 2018; McCann, 2017). Millennials continue to grow and expand its ranks in the United States; this generation is expected to peak in 2036 at over eight million (Fry, 2018). McCann (2017) stated that the Millennials are tech-savvy, self-confident, proficient at multi-tasking, energized, and are the most educated generation in history. McCann (2017) emphasized that Millennials are voracious information consumers and collect diverse types of data online and through social media outlets. Contrary to the earlier stereotypes for Millennials, the group has matured throughout the years. Milkman (2017) found that Millennials have more progressive attitudes and beliefs than other generations on eclectic issues from minorities to capitalism. In turn, many Millennials have acted on their beliefs through social movements such as “Occupy Wall Street”, which was a campus movement protesting against sexual assault and for the Black Lives Matter movement (Milkman, 2017).

**Millennials in the workforce.** The workforce is constantly changing with the seasoned generations gradually retiring and the younger generations graduating college and continuously entering the workforce (Özçelik, 2015). This cycle will persist as generations grow older and newer generations start to form. Millennials are a primary focus in today’s workforce because they will soon become the largest generation of employees (McCann, 2017). Özçelik (2015) indicated that forward thinking organizations have already started investing to attract, recruit, motivate, and retain
Millennials. McCann (2017) specified that Millennials are continuous learners and like to receive valuable training from employers to enhance their knowledge and remain competitive in the field. In his EAP research, McCann (2017) noted that programs that involved leadership development can help retain Millennials.

Millennials engage in trainings that lead to career enhancement. Training through mentoring and web platforms can help enhance Millennial career development (McCann, 2017). For evidence-based insights, a study conducted by Appel-Meulenbroek, Vosters, Kemperman, and Arentze (2019) concluded the following workplace needs for Millennials are as follows: sociability with colleagues, opportunity to grow, and work-life balance. In further study findings, Millennials attached more value to coaching and professional growth (Appel-Meulenbroek et al., 2019).

McCann (2017) shared that organizations can benefit from the achievement mentality of Millennials; this generation will put forth the effort to help an organization succeed. Lewis and Wescott (2017) believed that with Millennials advancing to middle levels in organizations, there is a need to create an organization for them to ensure long-term success for the future.

**Multigenerational Workforce**

Having different generations in the workplace has been in existence for years; however, the heighten focus on generational differences in recent years have increased the conversation about generations in the workplace (Chandra, 2018, Lyons, Urick, Kuron, & Schweitzer, 2015). More generations are overlapping due to the older generations working past retirement age. Vázquez and Lysenko (2017) contended that decreasing fertility rates, broken retirement systems, and increasing life expectancy due
to medical advances have contributed to delayed retirement. Times have changed in the workplace and some employees are now working into their late ages of 60s and 70s bringing several generations together and creating a multigenerational environment (Clark, 2017).

Referring to Table 1 in Chapter 1, there are five generations in the workforce with the youngest Traditionalist working just under the age of 76 years old and the oldest Generation Z working at no more than the age of 23 years old. This means that to be effective, organizational leaders should adapt to their diverse generational employee base. The lack of attention to generational differences can make an organization ineffective and encourage high employee turnover (Lewis & Wescott, 2017). Each generation brings unique needs to the workforce and organizations must have strategies in place to adhere to some of the generational needs. Lewis and Wescott (2017) suggested that lean principles can address the generations in the workforce contributing to a cohesive, content, and efficient workforce.

Lewis and Wescott (2017) also stated that lean principles, concepts, and tools can assist in bridging the generational gap creating effective organizations that are prepared for the new leadership style of the upcoming generations. Costanza and Finkelstein’s (2015) argued that there is minimal empirical data to suggest that generations are creating challenges in the workplace and cautions HR professionals against basing organizational strategies and decisions on generational stereotypes and myths. However, Lyons et al. (2015) stated in their research, that while stereotyping generations in not appropriate, the study of generations can contribute to acquiring quality information about the evolutionary nature of the workplace. In addition, Lyons et al. (2015) debunks the claims
of Costanza and Finkelstein’s argument that there is insufficient evidence of generational difference in the workplace and provided growing body of work that continues to grow the body of knowledge on this topic.

**Talent Management**

According to Cappelli and Keller (2017), “the term talent management (TM) was coined in the late 1990s by McKinsy and Company as a part of a research project,” (pg. 23). The ability to manage diverse generations and prepare for a generational shift will determine which organization will find and retain the best talent (Widén et al., 2016). Vázquez and Lysenko (2017) stated that under human resources management (HRM) which play a significant role in having highly talented personal face company challenges, TM strategies are comprised of work systems and processes related to recruitment and retaining. TM is a huge contributor to organizational recruitment/retainment and can come in various forms and positions.

Sparrow and Makram (2015) stated that practitioners in this field face choices about roles, designs, return on investment (ROI), ownership of talent functions, strategic workforce planning, employer branding, and global capability transfer. Sparrow and Makram (2015) argued that TM is a valuable field that oversees the management of talent. Sparrow and Makram (2015) defined TM as the combination of systems, processes, and practices developed and carried out by an organization to safeguard the management of talent successfully. Understanding employees’ needs are a vital part of TM. Davis, Cutt, Flynn, and Mowl (2016) highlighted the need for assessing employees to help manage developmental and aspirational needs as a helpful tool for TM professionals. Suggested strategies for assessment included assessing mindset, behaviors,
and skills; and incorporating those factors into effective training, professional development, and performance management interventions that can contribute to the success of an organization’s future (Davis et al., 2016).

TM leaders should be prepared to assist in harnessing the next generation of leaders as they prepare for future sustainability and competitive positioning. In an exploratory study on TM policies and practices in five Dutch Universities, Thunnissen (2016) identified the definition of TM as it relates to academic institutions and found that the main objective of TM was to achieve economic organizational goals with human capital. The findings noted there is data that support an aging workforce and one key priority of TM is to attract a new generation of academic professionals to fill vacant positions (Thunnissen, 2016). Moreover, the study uncovered that some departments had a substantial number of junior staff with scarce mobility to move into leadership roles and little access to more financial resources (Thunnissen, 2016). TM serves as the driving force to human capital in HR and plays a major role in guiding leadership succession planning (Vázquez & Lysenko, 2017). TM is now one of the most important terms in HR and continues to play a pivotal role in HR (Cappelli & Keller, 2017).

**Leadership Succession Planning**

According to Ballaro and Polk (2017), “developing an organization to meet future needs include a succession plan that supports employee development and TM” (pg. 43). Companies that want to be and stay competitive must not only excel in organizational elements but also understand the importance of human capital in various roles that hold major responsibilities (Vázquez & Lysenko, 2017). Strategic leadership preparation for the next wave of leaders should be an organizational priority especially when it comes to
unexpected leadership exits. Planning the succession of significant positions include the growth and development of an organization to achieve organizational objectives (Vázquez & Lysenko, 2017). Vázquez and Lysenko (2017) accentuated that companies should think broadly while succession planning and develop employees by instilling core competencies, so they become a future successor despite the length of service.

Groves (2018) argued that despite research and industry trends of the growing impact executive talent has on the strategic direction of an organization, some leaders still fail to make leadership succession planning a priority. Groves (2018) also discussed in his article the unforeseen exits of several chief officers from major companies; some companies were not prepared due to a lack of effective succession planning. Santora et al. (2015) stated that in their research, executive leadership succession planning has been neglected for several reasons and succession planning should be considered a priority. Santora et al. (2015) focused on executive succession planning research from six countries to determine if planning was implemented in those countries and if individuals that were being groomed for leadership roles were selected. Findings from the study by Santora’s et al. (2015) showed that non-profits in the United States had the lowest succession planning rates and United States non-profit organizations would most likely hire executives externally (Santora et al., 2015). The study by Santora et al. (2015) revealed a need for more emphasis on leadership succession planning in the United States for non-profits to prepare for unforeseen events and the next generation of leaders.

Newhall (2015) contended that there should be a more holistic approach to early leadership succession planning, development, and intervention aligned to TM programs. Newhall (2015) implemented a global research survey that generated more than 1000
responses from leaders in 54 countries; one third of the leadership was satisfied with succession programs. Based on the 2015 Newhall study, there is an opportunity to increase the satisfaction rate of succession planning to mitigate leadership gaps for the future.

**Generations aligned to leadership development.** Leadership development across all generations should be considered. There are many generations now in competition to fill leadership spots (Widén et al., 2016). Urick (2017) conducted a research on T&D aligned to generations. The findings concluded that the younger generations preferred the usage of leveraging technology and the older generations were more comfortable with on-the-job training and mentorship (Urick, 2017). Overall, best practices occurred when training and developing a multigenerational workforce provided various options for employees (Urick, 2017). In developing a multi-generational workforce, organizations should be open to utilizing different strategies for each generation to stay abreast of generational changes (Clark, 2017).

**Healthcare Systems**

The new wave of healthcare is coming in the form of combined services to provide a one-stop shop for consumers. A surge of hospital consolidation is vitalizing mergers of large multi-hospital systems throughout the United States (Melnick & Fonkych, 2016). Melnick and Fonkych (2016) highlighted competing theories about the motivation of hospital systems. Some hospitals that join larger hospitals to reach a greater population pose a challenge for insurance companies to develop health plans that include member hospitals; in turn, healthcare systems gain negotiation leverage (Melnick & Fonkych, 2016).
Johnson and May (2015) asserted that healthcare systems incorporate various activities and services that promote, restore, and maintain health. In addition, Johnson and May (2015) described healthcare systems as being high in complexity because of the stakeholders that are involved and the open system structure that has an interdependency with social and environmental factors. In their research, Johnson and May (2015) justified that while there is no clear definition of what a sustainable healthcare system is, research themes have a comprehensive approach with a long-term focus and the need to balance economic, social, and ecological demands. Love and Ayadi (2016) contended that healthcare is moving towards an integrated delivery system to include Accountable Care Organizations (ACOs), Physician-Hospital Organizations (PHOs), and Independent Physician Associations (IPAs), which requires the need for healthcare executives to have an innovative set of skills and competencies. In addition, Love and Avadi (2016) emphasized that health systems are moving towards prevention and wellness of the population which will require continuous executive development now and for future leaders to meet the changing demands in healthcare.

**Conceptual Framework Literature**

**Authentic Leadership**

American businessman and Harvard University professor Bill George coined the term authentic leadership. George (2003) stated that authentic leadership embraces purpose, value, and integrity that are inherited from their predecessors. In turn, this theory encourages leaders to pass the torch by giving future leaders the same knowledge given to them as they transitioned into leadership roles. Authentic theory discourages withholding information that can develop future leaders and encourages leadership
transparency (Luthans, Norman, & Hughes, 2006). Authentic leaders empower their followers to make a difference and are dedicated to upholding the principle of staying true to oneself (George, 2003).

Leroy, Anseel, Gardner, and Sels (2015) defined a characteristic of authentic leadership in the workplace as leaders that enact with their true selves and approaches one’s behavior with honesty. Leroy et al. (2015) contended that research surrounding an authentic leader has been one sided to group performance with less emphasis on authentic followership. Authentic followership is important because it considers the dynamic of how authentic leadership contributes to autonomous work motivation (Leroy et al., 2015).

While receiving attention in the last couple of years, there are claims of some complexities associated with authentic leadership. Nyberg and Sveningsson (2014) assessed the socially constructed and locally mediated nature of authentic leadership highlighting the irony behind the theory and leadership style. When some leaders act as one’s true self for the sake of authenticity, their actions can pose a negative response from followers (Nyberg & Sveningsson, 2014). Subsequently, some literature challenged the notion that acting like one’s true self will lead to good (Nyberg & Sveningsson, 2014). Nyberg and Sveningsson (2014) encourages organizations to view authenticity from different perspectives and notes that being true to one’s self should be grounded by overcoming inherited tensions between social discourses, past experiences, and future imaginations as a self-leader. When, leaders have the same expectations on how to incorporate authentic leadership, the theory is significant to setting the stage for the next generation of leaders.
**Generational Theory**

Mannheim (1952) suggested that generations are mere cliques with distinguishing characteristics from naturally developed or consciously willed ties. Individuals that belong to a generation share a common location aligned to social and historical processes that would limit them to a certain age range (Mannheim, 1952). American authors Neil Howe (1951-Present) and William Strauss (1947-2007) founded the widely known Strauss-Howe generational theory. Strauss and Howe (2007), defined a generation as a group shaped by events or circumstances according to which phase of life members occupy at the time. Understanding generations is a powerful tool that can assist in predicting future trends (Strauss & Howe, 2007).

Insights that come from seeing changes in the lens of generations can assist executives with business decisions that can strengthen companies for the future (Strauss & Howe, 2007). The generational concept is vital because it provides organizational leaders with knowledge on the general characteristics of the multi-generational workforce. The incorporation of this theory further enhances the knowledge of how business leaders can develop senior leadership strategies aligned to Millennials. While sociologist Karl Mannheim (1893-1947) is the driving force behind generations, Connolly (2019) claimed that Mannheim’s theory is a challenge to apply to empirical studies and that Norbert Elias (1897-1990) formulation on generational theories is stronger.

Elias’ work on generational theory can provide guidance and overly rationalistic accounts of social change explaining how a generational habitus is shaped and re-shaped (Connolly, 2019). Connolly’s (2019) findings also suggest that while Elias is not
highlighted as much as Mannheim, Elias’ generational theory approach is stronger in explaining intergenerational conflict. However, this does not deflate Mannheim’s work because Elias used the intellectual legacy of Mannheim’s work in his theoretical formulations (Connolly, 2019). Nonetheless, this theory can assist in mitigation of generational conflict and provide an understanding of generations to better prepare generations for senior leadership roles.

**Human Capital**

People are the heart of an organization because without the people an organization cannot survive. The human capital theory proposes that there are benefits to investing in people (Becker, 1962; Schultz, 1961; Sweetland, 1996). Investment in human capital through education and training presents improvements and opportunities to advance the workforce (Becker, 1962; Schultz, 1961). Moreover, the principal of human capital is the belief that individuals or organizational leaders should invest in people that are capable of learning which is a comparative value to goods and services (Nafukho, Hairston, & Brooks, 2004).

Economist have known for decades that people are an essential part of what drives the wealth of nations (Schultz, 1961). However, in the early 60s some people did not want to look at themselves as capital because they felt like they were being compared to slavery. Schultz (1961) stated, “our values and beliefs inhibit us from looking upon human beings as capital goods except in slavery, and this we abhor” (pg. 2). While there was a philosophical mechanism behind the term at the time to change the narrative for the future, Schultz (1961) emphasized the understanding that investment in people including underprivileged minorities is essential so they can be professionally skilled.
Becker (1962) highlighted from studies that income growth factors and other physical resources play a vital role to include the workforce. Becker (1962) noted that the general human capital theory has a wide variety of immense implications ranging from interpersonal to interchangeable differences in earning to shape profiles and skills. Levhari and Weiss (1974) argued that investment in human capital can be risky considering human capital cannot be bought, sold, and/or be separated from the owner. In essence, if leaders in organizations invest in human capital, they may lose the investment should employees decide to transition into a new role or job (Levhari & Weiss, 1974). Continuous training and education contribute to developing employees to increase productivity (Nafukho, Hairston, & Brooks, 2004).

Investing in human capital can help employees cultivate an environment that keep businesses executing organizational objective, goals, and end-state vision. Word and Sowa (2017) stated that human capital is highly used by non-profits to accomplish the mission and is the reason why non-profit thrive in some cases. Word and Sowa (2017) noted that people who are employed with a non-profit organization are not the largest expenditure but the biggest assets. Complementary to the writings of Word and Sowa (2017), Cappelli and Keller (2017) discussed the linkage between human capital and HRM’s TM with how one cannot have quality human capital without the HR team. The human capital theory compliments the goal of TM as it relates to investing in organizational talent (Cappelli & Keller, 2017). Having an appreciation for investment in people as it relates to human capital can create a beneficial return on investments long-term.
**Methodology Literature**

Qualitative and quantitative approaches are dissimilar in their ability to produce an outcome that is valid and reliable in its findings (Mays & Pope, 1995). Struss and Corbin (1994) defined qualitative research as a procedure that produces findings not measured by quantifiable means or statistical procedures. In this study, qualitative was the chosen method because the study explored strategies from a TM perspective which are not quantifiable as it relates to this case.

A qualitative research conducted by Holt, Marques, and Way (2012) examined the values and communication styles of Millennials. The findings concluded that organizations should not apply the same leadership style as previous generations; Millennials respond positively to transformational leadership styles (Holt et al., 2012). A qualitative study conducted in Turkey by Altinbasak-Farina and Guleryuz-Turkel (2015) provided insight on the value system of professional Millennials in marketing. The study found that Millennials respond well to managers when they feel respected and have a sense of belonging; they are also open to various communication channels and embrace social responsibility (Altinbasak-Farina & Guleryuz-Turkel, 2015).

Meng, Reber, and Rogers (2017) conducted a qualitative study that sought to understand the expectations of Millennials and their perspective regarding recruitment, leadership development, and engagement in the communications industry. The researchers emphasized the role TM professionals played in understanding Millennials; one outcome highlighted the strong desire Millennials had for self-improvement, leadership development, and work-life balance (Meng et al., 2017). While the values and
needs of Millennials are important for organizations to understand, there is a need for studies that puts emphasis on preparing Millennials for senior leadership roles.

**Research Design Literature**

A case study grants the researcher with an opportunity to explore individuals and organizations through complex interventions, relationships, communities, or programs (Baxter & Jack, 2008; Yin, 2003). The case study design facilitates the exploration of a case within its context using diverse data sources (Baxter & Jack, 2008). Johansson (2007) highlights that a case should be contemporary, investigated in a natural context with a multitude of methods, and should be a complex functioning unit. Mills, Harrison, Franklin, and Birks (2017) noted in their research of understanding the meaning of a case study, that the design is a versatile form of qualitative inquiry most suitable for an in-depth investigation of a phenomenon.

To address an aging workforce, Jantti and Greenhalgh (2012) conducted a case study to establish a transparent integrated approach to leadership competency development and succession planning. With the incorporation of a consultant to facilitate some research activities in the study, a commitment of coaching sessions, developmental programs, and workshops were found to be essential in preparing future leaders and engaging current leaders (Jantti & Greenhalgh, 2012).

Ewing and Remund (2017) conducted a case study to evaluate leadership developmental gaps of young professionals in the public relations industry. The results of the research highlighted a potential requirement for infusing leadership development in undergrad public relation programs and the need of developing leadership training programs (Ewing & Remund, 2017). Burgess-Wilkerson et al. (2018) noted in their
study that as of 2015, Millennials are the most represented population in the workplace
and for the next two decades, Millennials will confront global and public action issues.
Burgess-Wilkerson et al. (2018) argued that there was a lack of research involving the
social diplomacy of Millennials. The researchers found that Millennials need more
education on ethical business communication.

In examining the current literature for case studies in preparing Millennials
specifically for senior leadership roles, there was a clear gap in the body of knowledge.
There is adequate literature about managing, understanding the needs, how to
communicate, and how to work with Millennials; however, there was limited research on
advancing Millennials to senior leadership roles. With the representation of Millennials
in the workforce increasing, being proactive about leadership preparation is imperative.
The literature also spoke about succession planning, but not specifically to TM strategies
in advancing Millennials to senior positions within health systems.

Conclusions

In the effort to explore the historical and current developments surrounding
Millennial advancement to senior leadership roles, there were limited findings
specifically aligned to the study. However, the exploration of literature uncovered
content that was relevant to the study which aided in the research process. Examining the
literature from a historical and current perspective gave the researcher an appreciation for
the body of knowledge surrounding key concepts that were pivotal to the study.

Historically, an appreciation for understanding the coining of generations and
how the term emerged was significant. One of the pioneers of generations and the theory
was sociologist, Karl Mannheim (1893-1947). Mannheim (1952), identified that
understanding generations is the guide to recognizing the behaviors and actions of a certain group based off birth periods. After Mannheim, there were several theorists and researchers (Alsop, 2008; DelCampo et al., 2010; Howe & Strauss, 2007; Kaifi et al, 2012; Meister & Willyerd, 2010; Salahuddin, 2010) that used his work as the foundation. The generation term has led to understanding the types, names of the generations (e.g. Traditionalist, Baby Boomers, Generation X, Millennials, and Generation Z), and how they affect the world. Specifically speaking the Millennials has a huge impact on the social and economic forces (Howe & Strauss, 2007).

Millennials are entering the workforce in large numbers and organizational leaders must pay close attention to their needs (DelCampo et al., 2010). TM professionals must take note as generational changes transition into the workplace and prepare for succession planning to mitigate leadership gaps. While majority of the historical literature focused on how to work and manage Millennials, there was a gap in how to implement strategies that advance Millennials into senior leadership positions.

Current and historical content emulated each other regarding the desideratum for organizational preparation concerning a generational shift in the workforce and succession planning. Groves (2018) argued that despite research and industry trends of the growing impact executive talent has on the strategic direction of an organization, some leaders still fail to make leadership succession planning a priority. This finding is alarming considering the mass retirement of the Baby Boomers (Toossi, 2015).

In addition to the generations and succession planning, the researcher wanted to acquire an appreciation for understanding healthcare systems and how they make an impact in the communities. As healthcare demands change and technology continues to
enhance, it is imperative to incorporate future leadership development strategies. However, there was scarce research on how to prepare Millennials for senior leadership roles in non-profit healthcare systems, which further poses a gap in research. To assist in aiding the research, the conceptual framework and study design/method was highlighted to ensure the study stayed within the guidelines and criteria.

Chapter Summary

In Chapter 2, the researcher conducted a literature review by acquiring diverse literature that was closely aligned to the study topic. Hart (1998) emphasized that for a study to be valuable, the researcher must expand on the body of knowledge. The researcher displayed title search documents which highlighted where literature was obtained. Webster and Watson (2002) noted that in order to detect gaps in research, an examination of past research that exposes discrepancies between what is known and what need to be discovered, alerts what should be executed. The researcher analyzed historical and current content aligned to the study topic. In the literature review, content related to the study background and previous research were presented. As it relates specifically to healthcare systems, Love and Avadi (2016) stated that health systems will require continuous executive development now and for future leaders to meet the demanding changes in the healthcare industry.

The researcher illustrated literature aligned to the conceptual framework that provided the foundation for the research. Detailed content about the human capital theory, authentic leadership, and generational theory was presented to enhance the understanding of how these components make-up the conceptual framework. In addition, the researcher highlighted the methodology, design, and how a qualitative case study had
been used in similar research topics. Gaining an appreciation for literature that was consistent to the study, helped the researcher identify study gaps. Chapter 2 concluded the urgency for future leadership preparation. Subsequently, the literature determined an eagerness for research to uncover TM strategies for Millennial advancement to senior leadership roles as an addition to the body of knowledge. Chapter 3 contains an illustration and in-depth analysis of the research methodology, appropriateness of the design, sampling, population, field study, analysis, and chapter summary.
Chapter 3
Research Methodology

The purpose of this qualitative exploratory single case study was to investigate strategies that healthcare TM leaders in the Houston, Texas metro area currently have in place to advance Millennials to senior leadership positions. The objective was to discover current strategies TM healthcare leaders use for Millennial advancement to senior leadership roles. In chapter 3, research questions, population and sample, informed consent, instrumentation, the field test, validity and reliability, data collection, and the data analysis process are discussed. Understanding the process leading up to the study implementation allowed the researcher to be equipped in conducting a quality study.

Research Method and Design Appropriateness

Appropriateness of Method

According to Anderson (2010), qualitative research can be found in all social sciences and administered in various fields such as healthcare services, nursing, pharmacy, and business. Researchers of qualitative studies seek to discern and expound on a phenomenon in terms of how people bring meaning to them (Thorne, 2000). A qualitative methodology magnifies a subjective approach to social science and strives to understand the perspective of individual experiences to provide meaningful data (Laws & McLeod, 2004). This method embodies data collection, analysis, and interpretation that cannot be limited to numbers (Anderson, 2010).

The qualitative method provides a plethora of data collection techniques (interviews, observations, artifacts, video, photography, open-ended surveys, public
resources, autobiographical accounts, etc.) that enhances the researcher’s competency to formulate a quality study as an addition to the body of knowledge (Ormston, Spencer, Barnard, & Snape, 2014). A qualitative researcher’s goal is to uncover knowledge about how people think and feel relating to a phenomenon (Ormston et al., 2014). Inductive reasoning in qualitative research interprets and organizes meanings that can surface from data (Ormston et al., 2014).

Qualitative research is often criticized as bias, small scale, and anecdotal; however, when qualitative research is conducted correctly it is free of bias, in-depth, reliable, and creditable (Anderson, 2010). The researcher utilized a qualitative method to investigate leadership strategies aligned to an exploratory approach. A qualitative method was most appropriate to achieve the goal of this study.

Appropriateness of Design

For this study, the researcher implemented a single case study design to explore strategies TM leaders have in place to advance Millennials to senior positions in healthcare systems. Yin (2017) emphasized that a case study allows the researcher to incorporate an in-depth focus on a case to encourage a holistic perspective on a phenomenon. For case studies, the researcher investigates properties, actions, and social structures of individuals, groups, and organizations by implementing one or more data collection methods such as interviews, participant observation, and/or the analysis of documents (Bell, Bryman, & Harley, 2018). Bell et al. (2018) explained that a case is the phenomenon of interest within its right and the researcher’s goal is to provide an in-depth elucidation of the phenom. As suggested by Stake (1995) and Bell et al. (2018), the goal of the researcher that conducts a case study is to expand one’s perspective and learn.
Learning was the goal of the researcher in exploring TM strategies for Millennial advancement in senior leadership roles. The researcher reviewed possible approaches for this study, however, a case study was most appropriate to support the study’s goal.

**Phenomenological.** The approach of a phenomenological study is tailored to the lived experiences of humans. Yates and Leggett (2016) stated that phenomenology focuses on the shared human lived experiences of a certain phenomenon to uncover shared meaning and perspectives. In this study, lived experiences of the participants were not being explored.

**Grounded theory.** The aim of this approach is to formulate a theory through an iterative process (Yates & Leggett, 2016). To obtain data, the researcher observes the field to the natural setting in which participants live or work (Yates & Leggett, 2016). This approach was disregarded, since the goal of the study was not to develop a new theory, but to explore TM strategies already in place in a non-profit healthcare system.

**Narrative analysis.** This approach provides an analysis of life or life narratives with the use of stories as data (Merriam & Grenier, 2019). Forms of data come from biographies, autobiographies, oral history, autoethnography, and life narratives (Merriam & Grenier, 2019). The goal of this study was not to collect participant data from biographies, oral history, or life narratives.

**Ethnography.** This approach commonly identifies with the observation of participants in the field i.e. place of business, house, neighborhood, and/or one’s community (Boellstorff, 2012). Overall, ethnography focuses on the meaning of behavior, language, and group interaction by studying culture or shared groups (Creswell,
2013). This approach was eliminated because the researcher’s goal was to investigate TM strategies, not to assess the overall culture or shared beliefs and behaviors.

Unlike the other qualitative designs, case studies are distinguishable in that the researcher is mostly concerned with highlighting unique features of a case (Bell et al., 2018). A single case study design was most appropriate for this study because it allowed the researcher to focus on one case. Focusing on one case permitted the researcher to obtain in-depth knowledge from the participants creating a foundation for future studies to expand the body of knowledge.

**Research Questions**

A large part of implementing a research design is driven by the research questions because they seek to explain the “how” and “why” connected to a social phenomenon (Yin, 2017). The overarching research question for this qualitative case study was: What strategies do non-profit healthcare TM leaders use for Millennial advancement to senior leadership roles? To explore the main question, the sub-questions are as follows: RQ1. How do non-profit healthcare TM leaders develop strategies to advance Millennials to senior leadership roles in healthcare systems? RQ2. How do non-profit healthcare TM leaders identify barriers that affect prioritizing implementation strategies to advance Millennials to senior leadership roles in healthcare systems?
Population and Sample

Population

The population for this qualitative exploratory single case study included TM leaders from a public non-profit healthcare system in the Houston, Texas metro area. TM leaders was one of the focal points of this study. When referring to TM leaders, the researcher aimed to seek individuals who lead in TM initiatives. Example of TM leaders included: senior executive, management consultant, senior manager, division director, executive director, senior director, AVP, VP, SVP, chief officer, and/or a board of director member that were in the TM sector and/or had TM responsibilities. The researcher specifically targeted the above-mentioned key leadership roles in a Houston, Texas metro area healthcare organization. TM leaders from the public non-profit healthcare system understood leadership advancement strategies and leadership development strategies.

Sample

Bryman (2016) noted that in social research, researchers are rarely able to interview, observe, or send questionnaires to all individuals in the population that are necessary for a study. The chosen sampling technique must include the selection of a case and data sources to best help understand the case (Gentles, Charles, Ploeg, & McKibbon, 2015). In this study, a purposive sampling method was administered to create a sound judgement and acquire a better appreciation of the case. The purposive sampling technique is a deliberate choice of a participant due to qualifications and experience (Etikan and Bala, 2017).
Purposive sampling is a nonrandom technique the researcher implements when potential participants need to have knowledge and experience relating to the study (Etikan & Bala, 2017). The sampling technique used by the researcher established parameters to ensure the participant fit the criteria of this study. To qualify for the study, participants had to served in leadership position for five years or more, currently hold one of the following or similar titles- senior executive, management consultant, senior manager, division director, executive director, senior director, AVP, VP, SVP, chief officer, and/or a board of director member, and have TM responsibility in one’s current role. Before the study was administered, a recruitment letter was sent to potential participants that outlined study purpose and identity protection during the study (Appendix A). A total sample of 11 participants were selected. Interviews continued until saturation occurred. Saturation occurred at the ninth interview; however, two additional interviews were conducted to ensure no new information was provided.

**Informed Consent and Confidentiality**

Ethical considerations are significant when executing a qualitative study due to close interactions between the researcher and study participants. Having procedures in place to protect study participants guided the researcher in mitigating challenges associated with the study. This study was reviewed by two Internal Review Boards (IRB), the IRB within the chosen healthcare organization and the University of Phoenix IRB. This process included an examination of the research protocol, interview protocol, research correspondence with participants, and the Ethics and Compliance certification with the Collaborative Institutional Training Initiative (CITI). The IRB from the organization where the study was conducted, provided an exempt decision because the
study project focused on strategies and processes. The decision prompted the study oversight to fall under the HR department. Ensuingly, the University of Phoenix IRB issued an approval for the study to be conducted.

The researcher was accountable for providing detailed information about the study to include the purpose, objectives, and intention of how the study was disseminated. An informed consent document provides information to participants regarding confidentiality (Corti, Day, & Backhouse, 2000). A consent form was given to participants and signed by all participants before data collection via interviews. Study participants were reminded of the right to refuse involvement in the research process. In addition, participants were made aware that withdrawing from the study could occur at any time by notifying the researcher through phone or email as noted in the informed consent document. Confidentiality of participants is vital when safeguarding the privacy and discretion of one’s data (Check, Wolf, Dame, & Beskow, 2014). Participants in this study were identified by alpha numeric coding (i.e. P1, P2, P3, etc.).

Confidentiality Through Ethical Assurances

Having an ethical code can provide guidelines to uphold moral positioning in research (Hartas, 2015). An ethical code can assist in providing confidence i.e. assurance to potential study participants in knowing they are protected (Hartas, 2015). The ethical code for this study included the implementation of an informed consent and confidentiality.

All study participants partook on a volunteer basis and were free from any pressures to be involved in this study. No incentives, bribes, or compensation were affiliated with the study. As previously mentioned, before this study was conducted, the
researcher provided an informed consent form that outlined the study’s purpose, significance, data collection/analysis methods, participant rights, and information about the withdrawal process. Participants were given a discrete identifier i.e. alphanumeric coding (i.e. P1, P2, P3…) for identity protection. Names and identifiers that could expose study participants were protected electronically or by a locked box. For maximum protection, the electronic data gathered were stored on an encrypted locked file; after three years the files will be destroyed. All printed forms that included participants’ names were kept in a separate locked box from all other study data collected and will be destroyed after three years.

**Instrumentation**

The instruments used in this research included semi-structured interviews, with opened-ended questions, organizational TM literature, and organizational succession/strategic plans available for the purpose of triangulating all data for this study. Archived data, such as literature supporting TM leadership development programs, and organizational succession/strategic plans for advancing the next generation of leaders were approved by the organization’s HR executive leader. Interviews were the main data collection tool with a follow-up member check for clarification of responses. Semi-structured interviews guided both the interviewer and the interviewee to ensure that both parties remained focus. An interview protocol (Appendix B) was administered to ensure interviews were supported with guidelines to assist the researcher. The instrumentation items aligned to each research question is noted in Table 3. Research questions (RQs) were supported by specific IQs. All IQs can be found in Appendix C.

Table 3
Instrumentation Items Aligned to the Research Questions

Overarching Question: What strategies do non-profit healthcare TM leaders use for Millennial advancement to senior leadership roles?

RQ1: How do non-profit healthcare TM leaders develop strategies to advance Millennials to senior leadership roles in healthcare systems?

RQ1 is supported by IQ1, IQ2, IQ3, IQ4, IQ5, IQ7

RQ2: How do non-profit healthcare TM leaders identify barriers that affect prioritizing implementation strategies to advance Millennials to senior leadership roles in healthcare systems?

RQ2 is supported by IQ6, IQ8, IQ9

There were additional ways for the researcher to understand perspectives related to this case study. Both HR literature and strategies for succession planning assisted the researcher. The supplementary resources aided the researcher in understanding how strategies are communicated internally and initiatives are developed by TM leaders. Also, the additional resources were helpful during the triangulation process in comparing interviewees’ responses for this study.

Field Test

The researcher conducted a field test that included four public health subject matter experts (SMEs) who had research, HR and/or TM knowledge, and experience in providing feedback on the propose study’s instrument as it stands. Conducting a field test allowed the researcher to determine the pros and cons of the study’s instrument and afforded the researcher the opportunity to make changes as needed before the actual research took place. In this field test, four SMEs volunteered to review the design and IQs to ensure there was a strong alignment to the research questions. All SMEs held a
Masters’ degree or higher, had a combined 60+ years of research knowledge, and 20+ years of HR/TM knowledge. The recommendations included the following:

- Develop follow-up questions to pull additional data as needed. Example: Please explain? Can you elaborate?
- Reorder questions to gather basic information and then transition into targeted questions surrounding Millennials.
- Considering rewriting five of the nine interview questions (IQs) so the flow aligns with the study.

Other than the minor above recommendations, overall, the SMEs believed the IQs would elicit quality data to answer the RQs. Changes are highlighted Appendix C.

**Credibility and Transferability**

Collecting and analyzing data has its own set of challenges in qualitative studies (Birt, Scott, Cavers, Campbell, & Walter, 2016). The researcher put practices in place to stress the rigor and trustworthiness of data. Member checking was used in this study as an audit method to ensure the integrity of participant responses.

**Creditability**

Recorded interviews and documentation of the participants’ responses were used with a constant comparison process in data collection, member checking, and transcriptions before the data were imported into NVivo 12. The researcher manually analyzed data using excel to sustain credibility. Preliminary codes and word clouds helped guide in the manual coding and analysis process for emergent themes. The final themes that emerged from the interviews were consistent with the HR literature and strategic succession plan.
Transferability

Transferability is a method to provide rich and thick descriptions (Lincoln & Guba, 1985). The researcher supported transferability with rich and thick data to determine if the findings could be transferred to other similar situations. Constructive and evaluative procedures were used to guarantee trustworthiness and transferability of the study. The objective of the research provided clarity and reliability throughout the analysis process.

Data Collection

For this study, there were three phases for data collection. Phase 1: Semi-structured interviews were conducted to collect data from participants for the study. Interviews were scheduled face-to-face or by conference call. A recruitment email was sent to potential participants meeting the requirements for a purposeful method. Once the informed consent forms were signed by interested participants, interviews were scheduled. Phase 2: The organization’s literature on leadership training programs were reviewed. Phase 3: The succession plan from the organization was reviewed to determine how Millennials and the next generation of leaders are developed and replaced. Triangulation was met by conducting interviews, reviewing HR literature, and strategies for succession planning.

Data Analysis

After all the data were gathered from the interviews, the researcher adopted a systematic approach to analyze the data. The thematic analysis process was a guide mechanism that assisted in outlining a systematic five-step process on how an analysis was conducted offering insight related to patterns and themes. The researcher manually
analyzed data using excel, before importing the data into NVivo 12. NVivo 12 produced word clouds, which helped guide in the manual coding and analysis process for emergent themes.

While coding to uncover themes, focus coding was implemented to concentrate on the frequency of responses. To further narrow coding for final themes, the researcher combined themes based on relationships using theme coding. The next section provides a step-by-step process on how interview data were analyzed based on a thematic analysis.

**Thematic Analysis**

The researcher utilized Braun and Clarke’s (2006) thematic analysis process as a guide to data analyzation. Steps the researcher implemented are listed below:

*Step 1: Get familiar with the data acquired from interviews* - Before starting the initial coding process, the researcher had to consider professional background and how one’s knowledge could possibly influence the data. With a background in T&D and researcher affiliation with the organization where the study was conducted, objectivity had to be implemented with an open mind. The researcher practiced bracketing by going into each interview with a clear mind that was free of bias so the data could speak for itself. After member checking, all interview responses were transferred to an excel document aligned to the targeted RQ. The researcher read through participant responses several times to gain an understanding of the data.

Common methods were reviewed but the researcher settled with utilizing focus and theming coding for this study project.

*Step 2: Assign preliminary codes to study data in order to describe the content* - To start the coding process, NVivo 12 Auto Coding Method was utilized to develop pre-codes for
guidance. The NVivo 12 auto codes aided the researcher in developing initial themes from the interview data. The researcher divided the IQs and answers based off the research questions (RQ1 or RQ2). Two documents were uploaded by the researcher from excel into NVivo 12 with interview responses supporting RQ1 and RQ2. Figure 2 shows the initial pre-codes for each RQ below.

![Figure 2. Pre-Codes from NVivo 12](image)
After the NVivo 12 Auto Codes were produced to elicit pre-codes and a word cloud was administered for additional guidance, initial themes were developed from the frequency of participant responses; pre-codes were used to show connection and consistency.

Step 3: Search for patterns or themes in codes from interviews- Focused coding was utilized to search for the most frequent patterns from the initial themes. Theme frequency from participant responses that supported RQs were tracked one-by-one.

Step 4: Review themes- In reviewing the initial themes from each IQ aligned to the RQs, the researcher focused on themes that had five or more participant responses and highlighted the top themes that answered the RQs. The researcher grouped the highlighted top themes associated with RQ1 for theme finalization; the same step was administered for highlighted themes regarding RQ2. A list of the top initial themes is displayed in Appendix D.

Step 5: Define and name theme- This step solidified the final themes associated with the RQs.

Chapter Summary

In Chapter 3, the research method, design, population, and sample method were discussed to reiterate topics briefly captured in Chapter 1. In considering all research avenues, the researcher deemed that for this study, qualitative research was best. A qualitative researcher’s goal is to uncover knowledge about how people think and feel in relation to a phenomenon (Ormston et al., 2014). Implementing a qualitative case study was suitable in reaching the goal of this study in determining what strategies TM leaders use to advance Millennials to senior leadership roles. Bell et al. (2018) explained that a
case is a phenomenon of interest within its right and the researcher’s goal is to provide an in-depth elucidation of the phenom when executing a case study.

Chapter 3 included a discussion of the informed consent form and the IRB process. A field test was conducted to ensure the IQs supported the overarching and sub-research questions for this study. The SMEs provided guidance on which IQs needed to be revised. Before gathering interview data, the researcher made sure that participant confidentiality was upheld, and ethics were enforced. Having an ethical code provides guidelines and uphold moral positioning in research (Hartas, 2015). Enforcing an ethical code allowed the researcher to set boundaries that encouraged unbiases and ensured integrity. For analysis, the researcher utilized Braun and Clarke’s (2006) thematic analysis process as a guide for data analyzation. The NVivo 12 software system and Microsoft Excel were used to support the data analysis process. Once the data was analyzed themes emerged which is fully explained in the next chapter. In Chapter 4, the findings from the data collected are presented.
Chapter 4
Analysis and Results

The purpose of this qualitative exploratory single case study was to investigate strategies healthcare TM leaders currently have in place to advance Millennials to senior leadership positions in the Houston, Texas metro area. The overarching question that guided this case study was: What strategies do non-profit healthcare TM leaders use for Millennial advancement to senior leadership roles? Chapter 4 contains the research process that was implemented during this study to obtain and analyze data. The data collection instrument included semi-structured interviews from 11 TM leaders working in a non-profit healthcare organization. Leaders that participated in this study provided their perspectives on current strategies in place aligned to succession planning for Millennial leadership development. In addition, data were triangulated with the organization’s strategies for succession planning and HR literature regarding leadership development strategies. The data collection process is accentuated; an analysis of the data and how themes emerged are explained in this chapter.

Research Questions

To start this qualitative exploratory single case study, an overarching question was developed to provide direction to the study that assisted in filling a gap in the body of knowledge. As previously stated, the overarching question that guided the study was: What strategies do non-profit healthcare TM leaders use for Millennial advancement to senior leadership roles? There were two sub-research questions that assisted in obtaining data to support the overarching question which included the following:

RQ1: How do non-profit healthcare TM leaders develop strategies to advance
Millennials to senior leadership roles in healthcare systems?

RQ2: How do non-profit healthcare TM leaders identify barriers that affect prioritizing implementation strategies to advance Millennials to senior leadership roles in healthcare systems?

Data Collection

NVivo 12 and Microsoft Excel were used to analyze data collected from the semi-structured interviews. With participant approval, interviews were recorded and then transcribed using Microsoft Word. Transcribed responses were provided to each participant to review for accuracy. Member checking ensured trustworthiness of participant responses. The researcher utilized a thematic analysis process to categorize data into components; those parts were given labels to assist with discovering common threads. Constant comparative was the core strategy implemented to support emerging codes that were generated from participant interviews. HR leadership development literature and organizational strategic succession planning were frequently compared throughout the research as data emerged.

Pre-coding came from the semi-structured interview transcript imputed into the NVivo 12 analysis system. Pre-codes from NVivo 12 (e.g. Figure 2) guided the manual coding process in Microsoft Excel. Mentioned in Chapter 3, to further aid in initial theme development, a word cloud was used that combined data collected to show word frequency. In Figure 3, the word cloud outcome from interviews is displayed below.
Figure 3. Word cloud from interview data

Demographics

Demographics for the study were identified by job classification, area, years in current role, and years in leadership. The researcher interviewed leaders that had TM responsibilities and supported TM initiatives. Specifically, the researcher interviewed 11 individuals in leadership roles at a public non-profit healthcare system located in the Houston, Texas metro area. Table 4 displays the demographics of the participants.
Table 4

*Participant Demographics*

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<th>Job Classification</th>
<th>Number of Years in Current Role</th>
<th>Number of Years in Leadership</th>
</tr>
</thead>
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<td>10</td>
</tr>
<tr>
<td>Senior Consultant</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Director</td>
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<td>22</td>
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<td>10</td>
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</tbody>
</table>

Displayed in the Figure 4 is a participant breakdown via organizational area by percentage. For this study, there was representation from each area of the health system with majority of the participants volunteering from the business area associated to HR.

*Figure 4. Participant breakdown by percentage.*
The participant percentage breakdown by title is displayed below in Figure 5. Directors had the largest representation in this study; however, there was representation from all levels of leadership which showed participant diversity.

![Participants by Title](image)

*Figure 5. Participants by title*

**Data Analysis**

Mentioned in Chapter 3, a field test was conducted prior to officially starting the study; IQs were examined to ensure sound data acquirement. After the field test and IRB approval, the official study initiation started with a participant invitation letter (e.g. found in Appendix A) sent via email to leaders with TM responsibilities. The non-profit healthcare system is divided into three areas to include: academic enterprise, business, and healthcare. The researcher targeted HR leaders who worked within the business area of the organization. After no more participants expressed interest in partaking in the study from HR, invitation letters were sent to other area (e.g. academic enterprise and healthcare) leaders of the organization with TM responsibilities. TM leaders who expressed their interest in the study were sent an informed consent document via email to sign and return before the interview. Semi-structured face-to-face interviews were
scheduled by email with TM leaders, who worked in the Houston, Texas metro area. For those who could not meet face-to-face, a conference call was scheduled which was the participant’s choice in a mutual agreement. At the end, there were 11 participants interviewed. Interviews continued until data saturation occurred. Data saturation occurred with the ninth participant, nonetheless, two additional participants were interviewed to ensure no new data emerged.

Before each interview, the researcher read an interview protocol. A copy of the interview protocol is placed in Appendix B. While reading the protocol, participants were identified by code (P1, P2, P3…) and the researcher asked for consent to record. Each interview was recorded using an audio recorder and the same nine open-ended IQs were asked during every interview. While the researcher allotted one-hour for each interview, participant interviews on average lasted no more than 30 minutes. Recordings were transferred to a secured laptop for transcription. During the transcription process, the researcher was able to review and replay the interview to transcribe manually using Microsoft Word. Once interviews were transcribed, the researcher sent interview documents to participants for review (i.e. member checking). During member checking, participants reviewed their responses for verification, accuracy, and change as needed.

To triangulate data obtained from interviews, the researcher attained permission to gain access to additional data that may not be readily available to the public. While some requests could not be fulfilled because there was scarce literature and/or data available for the researcher to review, the researcher was able to review the organization’s brief organizational strategic succession plan and HR literature of leadership development programs.
Focus coding propagated during the thematic analysis process described in Chapter 3, compared participants’ perceptions. The last step of coding, involved a review frequency of responses for preliminary theme development, followed by an analysis of relationships to refine the final emerging themes. The researcher reviewed frequency and relationships from the initial theme to develop three final themes that answered RQ1 and RQ2.

Results

Themes that emerged were confirmed by participant responses for credibility. There were three main themes and two sub-themes that emerged from the data; themes one and three had sub-themes. All three themes supported the following RQs for this qualitative exploratory single case study. The main research question was, what strategies do non-profit healthcare TM leaders use for Millennial advancement to senior leadership roles? To explore the main question, sub-questions were: RQ1. How do non-profit healthcare TM leaders develop strategies to advance Millennials to senior leadership roles in healthcare systems? RQ2. How do non-profit healthcare TM leaders identify barriers that affect prioritizing implementation strategies to advance Millennials to senior leadership roles in healthcare systems? Final themes that emerged from the study are listed in Table 5.
Table 5

*Final Themes and Sub-themes*

Themes 1 and 2 support RQ1 and Theme 3 supported RQ2

**Theme 1:** Lack of leadership development strategies at the organizational level specifically for Millennials.

**Theme 1 Sub-theme:** Leadership development strategies are conducted on a departmental level.

**Theme 2:** HR leadership development programs are open to all generations.

**Theme 3:** There are no organizational strategies to mitigate barriers for Millennial leadership advancement.

**Theme 3 Sub-theme:** While there is no official leadership succession plan in place, there is an interest in developing one at the organizational level.

**Themes 1 and 2 Supported RQ1**

RQ1: How do non-profit healthcare TM leaders develop strategies to advance Millennials to senior leadership roles in healthcare systems? Out of nine IQs, six of those questions aided in answering RQ1 to support Themes 1 and 2 found in Appendix C.

**Theme 1: Lack of leadership development strategies at the organizational level specifically for Millennials.** Appendix E highlights participant data to support Theme 1. Fifty-five percent of participants believed that there were no leadership development strategies in place that specifically targeted Millennials. However,
Millennials could participate in HR programs which served as a leadership development strategy option. As noted by P1,

> In general, I would say what our organization does, not just for Millennials, is they strive to make sure that people have access to professional development by bringing in external speakers and those type of things related to professional development.

P6 stated, “To my knowledge there aren’t any leadership strategies that we use to prepare a targeted group such as the Millennials.” P9 added, “At this time, there are no leadership development strategies that target Millennials.” Majority of the participant comments that support Theme 1 is listed in Appendix E.

**Theme 1 Sub-theme: Leadership development strategies are conducted on a departmental level.** According to the leaders interviewed, 55% shared that leadership development was done at the departmental level. P7 highlighted that with the stereotype of Millennials having a high turnover rate, they have retained several Millennials through their fellowship program which encourages development. P1 and P7 shared various formal initiatives that were currently in place at the departmental level that pursued the development for the next generation of leaders. Illumin-8 is one formal departmental program, but leaders from different areas of the organization were encouraged to participate. P1 stated,

> I think Illumin-8 is a great innovative strategy because it was grassroots and it was developed by a couple of managers who thought, ‘this is a gap we are missing’. We think this is a great way for people to identify themselves as leaders without the leadership title. They can realize that they can lead in other ways.
P7 described in detail more information about the Illumin-8 workshop,

The one I wanted to mention, we call Illumin-8. It's a follow-up to Breakfast Club, it's like the next iterations of Breakfast Club being a topic discussion or a book club one hour a month. Illumin-8 expands on that, in three facets being a full day focused on self, like emotional intelligence, and other self-focused introspective topics: it's three days over three months. And so, the next full day is a team centric approach with tactical, how to work effectively with others, some lean principles, process improvement, and then the last one focuses on lead. But again, differentiating very distinctly from true management, whereas anybody can be a leader if they have something worth following and have achieved someone following them in that regard. So, the last one focuses on leadership, which is just being effective with life skills.

For further details about departmental/area programs visit Appendix G and Appendix F highlights participants’ responses to support sub-theme 1.

**Theme 2: HR Leadership development programs are open to all generations.**

Throughout the interviews, 100% of participants mentioned several leadership developmental programs were offered on an organizational level. Leadership development programs were managed by HR and open to all generations. However, those programs were exclusive to class size, job title, and/or executive nomination. Ninety percent of participants revealed the HR programs do not specifically target Millennials, but the programs were strategies for leadership development. P3 emphasized,
Well, for one thing, we don't just target Millennials, we have programs for anyone in a particular role. We have basically three buckets of development. One is for employees, the other for managers, and then the rest focuses on directors in the boat which we term, executives.

P8 stated,

We have coaching for emerging leaders, that's probably going to be the main program that we have that will train the next generation for possible senior leadership roles. That program does not target Millennials out right, but I would say Millennials will probably be in that group.

P11 noted,

From an organizational level, the institutions have implemented a "My Road Ahead". This is a requirement of not only Millennials, but all employees are required to have a development goal. There is also foundational management training program offered. Another program has changed names a couple of times, but if I'm not mistaken, it’s still called Emerging Leaders program.

The remainder of the participants’ responses are in Appendix H.

**Theme 3 Supported RQ2**

RQ2: How do non-profit healthcare TM leaders develop strategies to advance Millennials to senior leadership roles in healthcare systems? Out of nine IQs, three of those questions aided in answering RQ2 to support Theme 3 found in Appendix D.
Theme 3: There are no organizational strategies to mitigate barriers for Millennial leadership advancement.

Ninety percent of the participants explicitly conveyed throughout the interviews there were no formal organizational strategies to mitigate challenges for Millennial advancement to leadership roles. P8 remarked,

Sometimes there are barriers like lack of resources, finances, and opportunity that you just cannot escape as a leader. I would say that we just need to be more proactive and have some initiatives in place. Currently, we have no formal strategies that is being used to mitigate these challenges.

P10 expressed,

I don’t think there are strategies currently in place to mitigate. I think that it's just a sign of the time. There is a war for qualified talent and so it's not an option to not only develop leaders internally but to even compete for Millennial leaders.

Fifty-five percent of participants voiced that barriers are caused by limited resources to support a lack of opportunities. P9 stated,

I think barriers are the limitation with positions and with resources. Also, the lack of knowledge of leadership about the preparing this generation to carry on the torch after they leave the organization. I know that I must rethink how I am approaching leadership preparation on my end for the future.

Appendix I, displays statements from participants that supported the theme in detail.

Theme 3 Sub-theme: While there is no official leadership succession plan in place, there is an interest in developing one at the organizational level. Ninety percent of the participants expressed throughout the interviews that there was no formal leadership
succession plan in place at the organizational level that specifically targeted Millennial advancement. Sixty-five participants articulated that while there was no formal leadership succession plan, they were interested in having a plan. P5 shared,

“Succession planning doesn't happen organically. Identifying talent doesn't happen organically. Academic medical centers feel a need to open the talent pool and do a lot of national searches, which is a lot of money spent on that. And I think some of those things we could avoid if we did have much more robust succession planning.”

P10 stated, “I do not currently have any formal strategies in place at this time.”

However, at least three participants shared that there was an informal leadership succession plan at the departmental level. A statement from one of the participants, P9 was as follows, “I do not have any formal strategies but there are some informal things that I do.” The remainder of the participants’ statements that support the theme are in Appendix J.

**Chapter Summary**

The analysis and themes that emerged from the data obtained by conducting semi-structured interviews with 11 participants were presented in Chapter 4. A thematic analysis process was supported through a step-by-step strategy to help code and develop emergent themes. The study was guided by an overarching question supported by 3 themes and 2 sub-themes. Triangulation was achieved with semi-structured interviews, the assessment of the HR leadership development program literature, and the organization’s brief strategic succession plan. The researcher was able to review the organization’s strategic plan, where there appears to be a succession plan in progress, but
not an official completed plan. Additionally, the researcher reviewed organizational literature in the form of Power Point presentations and documents from the organization’s website that outlined leadership development programs at the organizational and departmental levels. The data from the resources confirmed the emerging final themes to ensure credibility.

There were no organizational strategies to mitigate barriers for Millennial leadership advancement as noted by participants’ responses to the IQs. Based on the comments from participants, there appears to be no formal leadership succession plan in place at the organizational level; however, there are informal leadership succession plans in place at the departmental level. Chapter 5 includes the conclusion and recommendations for leaders and future research.
Chapter 5

Conclusions and Recommendations

The purpose of this qualitative exploratory single case study was to investigate strategies, healthcare TM leaders currently have in place to advance Millennials to senior leadership positions in the Houston, Texas metro area. The goal of this study was to explore current leadership development and advancement strategies healthcare TM leaders implement, that could impact other healthcare and business leaders struggling with developing and executing strategies for Millennial advancement to senior leadership roles. In this final chapter, the following are presented: research questions, discussion of the findings, limitations of the study, recommendations for organizational leaders, and recommendations for future research.

Research Questions

The overarching question that guided this qualitative case study was: what strategies do non-profit healthcare TM leaders use for Millennial advancement to senior leadership roles? To explore the main question, the sub-questions for this study was as follows: RQ1. How do non-profit healthcare TM leaders develop strategies to advance Millennials to senior leadership roles in healthcare systems? RQ2. How do non-profit healthcare TM leaders identify barriers that affect prioritizing implementation strategies to advance Millennials to senior leadership roles in healthcare systems?
Discussion of Findings

From the findings, there were three main themes and two sub-themes that emerged from the data, which were presented in Table 5 highlighted in Chapter 4. Themes that answered the RQs were compared to the literature and are presented below:

**Theme 1: Lack of leadership development strategies at the organizational level specifically for Millennials.**

McCann (2017) shared the perspective that Millennials are a primary focus in today’s workforce considering they will soon become the largest generation of employees. On the contrary, this study uncovered that Millennials are not targeted in leadership development. Mentioned in Chapter 4, over 55% of the participants of this study mentioned specifically that Millennials were not the targeted generation for leadership development which means this generation is not the primary focus of the workplace.

Also, noted in the literature, Costanza and Finkelstein (2015) argued that there is minimal empirical data to suggest that generations are creating challenges in the workplace and cautions HR professionals against basing organizational strategies and decisions on generational stereotypes and myths. In this study, 45% percent of participants did recognize that there was a Millennial stereotype in the workplace. However, Lyons et al. (2015) found in their research, that while stereotyping generations is not appropriate, the study of generations can contribute to acquiring quality information about the transforming nature of the workplace. In agreement with Lyons et al. (2015) during this study’s interviews, 55% of participants disclosed an interest in enacting more open conversations associated with the generational shift in the workplace.
Theme 1 Sub-theme: Leadership development strategies are conducted on a departmental level.

In the literature, Urick (2017) employed research on T&D aligned to generations. The findings concluded that younger generations preferred the usage of leveraging technology and older generations were more comfortable with on-the-job training and mentorship (Urick, 2017). Based on 55% of the respondents in this study, Urick’s (2017) study findings were being embraced at the departmental level as it relates to on-the-job training.

In the study by Appel-Meulenbroek et al (2019), it was uncovered that Millennials attached more value to coaching and professional growth. This finding was being practiced at the departmental level in agreement with the Appel-Meulenbroek et al. (2019) study. From the data gleaned, this study uncovered that 55% of participants deployed coaching and job shadowing in development. Also, Kuhl (2014) noted that due to the affluence of this generation, managers should adapt their leadership style to motivate and provide feedback to Millennials through acquired best practices. In agreement with Kuhl (2014), this practice is exercised at the departmental level regarding programs that assist in development. Departmental programs are listed in Appendix G.

Theme 2: HR Leadership development programs are open to all generations.

DelCampo et al. (2010) discussed that leaders must leverage the expectations of each generation in the workforce to provide value to generational traits, characteristics, strengths, and weaknesses. However, expectations of generations especially when it came to Millennials in leadership development and advancement was not practiced within the organization used in this study. In agreement to DelCampo et al’s (2010)
findings, 90% of study respondents asserted that leadership development and programs were not generation specific to Millennials.

In his EAP research, McCann (2017) noted that programs involving leadership development can help retain Millennials. McCann (2017) specified that Millennials are continuous learners and like to attain valuable training from employers to enhance their knowledge and remain competitive in the field. As previously stated, 90% of participants acknowledged that organizational leadership developmental programs were not specific to Millennials. However, 55% of participants were open to having conversations about the generational shift to understand what is peremptory to train the next generation of leaders.

Clark (2017) emphasized that when developing a multi-generational workforce, organizational leaders are encouraged to be open-minded and utilize varied strategies that cater to each generation. On the contrary, in examining HR leadership development programs for this study, the researcher discovered that prior to gaining access, certain requirements had to be attained. In addition, no organizational program targeted a certain generation.

**Theme 3: There are no organizational strategies to mitigate barriers for Millennial leadership advancement.**

Özçelik (2015) stated that forward thinking organizations have already started investing to attract, recruit, motivate, and retain Millennials. On the contrary, this study was conducted within a forward-thinking organization and 90% of participants expressed no usage of organizational level strategies to mitigate barriers for Millennial
advancement. From the data, one could assume that there were no official investment strategies specifically for Millennials.

Bannon et al. (2011) contended that Baby Boomers are approaching retirement age; it is important for employers to understand what motivates Millennials to retain through a generational shift. In addition, Vázquez and Lysenko (2017) revealed that decreasing fertility rates, broken retirement systems, and increasing life expectancy due to medical advances have contributed to delayed retirement. In agreement with the literature regarding retirement rates and delayed retirement, 55% of participants claimed that there were limited positions and no official organizational strategy used to mitigate these barriers.

**Theme 3 Sub-theme: While there is no official leadership succession plan in place, there is an interest in developing one at the organizational level.**

Consistent with the literature presented, there was a lack of leadership succession planning for Millennials at the organizational level. Groves (2018) argued that despite the research and industry trends of the growing impact, executive talent has not been the strategic direction of an organization, and some leaders still fail to make leadership succession planning a priority. This study directly showed data that agree with Groves (2018) mentioned by 90% of the participants.

In the literature, Santora et al. (2015) stated that in their research, executive leadership succession planning had been neglected for several reasons and succession planning should be considered a priority. Santora et al. (2015) focused on executive succession planning research from six countries to determine if planning was implemented in those countries and if individuals that were being groomed for leadership
roles were selected. Findings from the study by Santora’s et al. (2015) showed that non-profits in the United States had the lowest succession planning rates and would most likely hire executives externally. Data from this study coincides with research by Santora’s et al. (2015) regarding the lack of succession planning. However, in this study, 65% of leaders recognized the need for leadership succession planning.

**Limitations**

One limitation was the lack of participation from executive leaders. While the researcher interviewed some executives, scheduling made it difficult to interview all the executives. Another limitation was the lack of participation from HR; the researcher had to seek other leaders with TM responsibilities outside of HR. This was a direct result of minimal responses to participate in this study. The researcher had no control over HR participation. Lastly, the perspective was limited to one organization in the Houston, Texas metro area. While the organization is one of the largest healthcare systems in the area, data was derived only from one service location that related specifically to that organization and cannot be generalized to all organizations.

**Recommendations to Leaders and Practitioners**

Themes and discussions that derived from this study are applicable to all organizational leaders that have TM responsibilities. Recommendations for leaders place a high emphasis on leadership development and succession planning. Both factors are vital for the organizations’ progression to stay at the forefront of the healthcare industry. The recommendations provided could assist with sustainability and competitive advantage long-term in reference to the conceptional framework. Table 6 highlights recommendations aligned to the emerging themes.
### Table 6

**Recommendations**

<table>
<thead>
<tr>
<th>Themes</th>
<th>Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Theme 1:</strong> Lack of leadership development strategies at the organizational level specifically for Millennials. <strong>Sub-theme 1:</strong> Leadership development strategies are conducted on a departmental level.</td>
<td>Organizational leaders should consider what other departments are doing for leadership development to elicit ideas for developing formal leadership development strategies at the organizational level to target the next generation of leaders. Leaders should consider expanding the budget for more generational research on the outlook of the current workforce. There should be knowledge training to reach more employees aligned to inclusive leadership development programs to include career development plans. If available, organizations should leverage help from employee resource groups (ERGs) or employee affinity groups that focus on professional leadership development to help with this initiative. If not available, organizations should explore the development of ERGs/employee affinity groups that has a focus on professional leadership development.</td>
</tr>
<tr>
<td><strong>Theme 2:</strong> HR Leadership development programs are open to all generations</td>
<td>There is a vital need for the development and implementation of an official organizational leadership succession plan to develop the next generation of leaders. There should be strategies noted in the succession plan that identify how to mitigate barriers that may affect leadership development. The leadership succession plan should be overseen by the HR Department and shared within the organization. Departments should use the succession plan for organizational consistency. If specialty elements are added, the foundation must be consistent with what HR sets in place.</td>
</tr>
<tr>
<td><strong>Theme 3:</strong> There are no organizational strategies to mitigate barriers for Millennial leadership advancement. <strong>Sub-theme 2:</strong> While there is no official leadership succession plan in place, there is an interest in developing one at the organizational level.</td>
<td></td>
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</tbody>
</table>

85
Recommendations for Future Research

For future studies, there are several valuable areas that could be researched and added to the body of knowledge. A multi-case study should be considered to compare various HR departments and their succession plan strategies for advancement for the next generation of leaders to include Millennials. Another recommendation is to conduct a qualitative study to uncover Millennials’ strategies to advance themselves to leadership roles within a non-profit organization.

Chapter Summary

The purpose of this study was to learn what TM strategies were used to advance Millennials to senior leadership roles within a non-profit healthcare organization. The researcher chose to focus on Millennials because they make up at least 50% of the workforce and will be the dominant generation for the next decade (Ferri-Reed, 2015). While McAlearney (2010) noted that a leadership strategy goes beyond lower level leaders and enhances competency through executive concepts. From the researcher’s findings, McAlearny’s (2010) mindset was not embraced. Overall, there are no formal strategies or plans in place to advance Millennials to senior leadership roles in some non-profit healthcare organizations in the Houston, Texas metro area.

Guided by the overarching question: What strategies do non-profit healthcare TM leaders use for Millennial advancement to senior leadership roles; and two additional research questions: RQ1: How do non-profit healthcare TM leaders develop strategies to advance Millennials to senior leadership roles in healthcare systems; RQ2: How do non-profit healthcare TM leaders identify barriers that affect prioritizing implementation strategies to advance Millennials to senior leadership roles in healthcare systems; the
study findings produced three themes and two sub-themes. Themes that emerged from the study were compared to the information gathered from the literature review to uncover similarities and/or differences. One consistent key finding compared to the literature, was Millennial leadership development existed at a departmental level. On the contrary, one vital finding that was not consistent with the literature was forward-thinking organizations invest in Millennials. The organization of study is one of the top healthcare leaders in the Houston, Texas metro area, nonetheless, developmental investment was not generational specific.

Recommendations from the researcher encouraged organizational leaders to invest in generational research as it relates to personnel, so the organization is prepared to transform with the changing workforce. An increase in resources, inclusive leadership development programs/initiatives, career development plans, and the development and implementation of a robust leadership succession plan are all necessary for a multi-generational workforce. Henceforth, it is pivotal for organizational leaders not to miss the mark to invest in their employees by being proactive about the generational shift that will happen in the workforce for years to come. This study is valuable to the body of knowledge given the perspective morphs from how to manage Millennials, to now advancing them to leadership roles. An anticipatory organization that has a succession plan in place to advance the next generation of leaders has a contingency to withstand and thrive in the future.
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106


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Dear Potential Study Participant,

My name is Jayco McCowan and I am a doctoral student at the University of Phoenix working on a Doctorate of Business Administration (DBA) degree. I am conducting a research study entitled “Talent Management Leaders’ Strategies for Millennial Senior Leadership Roles: A Qualitative Case Study”. The purpose of this qualitative exploratory single case study is to investigate strategies, healthcare talent management leaders currently have in place to advance Millennials to senior leadership positions in the Houston, Texas metro area. Exploring current leadership development and advancement strategies healthcare talent management leaders implement may assist other healthcare and business leaders struggling with developing and implementing strategies for Millennial advancement to senior leadership roles.

I am contacting you based on your leadership position aligned to talent management (TM) and your expertise in developing the next generation of leaders within your organization. As such, your perceptions, experiences, and expertise would be of interest to me in the study. If you meet the criteria below and are willing to be a participant in this study, you will volunteer to participate in a face-to-face or a telephonic interview of approximately 1-2 hours that would be recorded for transcription. The transcription of your interview would be verified by you, coded, and then analyzed by the researcher (i.e. myself). The criteria for participation include current leaders in leadership roles aligned to TM who have served in a leadership position for a minimum of three years, either as a senior executive, management consultant, senior manager, division director, executive director, AVP, VP, SVP, chief officer, and/or a board of director member responsible for developing and/or executing strategies that advance the next generation of leaders, specifically future Millennials leaders to senior leadership positions.

Your participation in this study will remain confidential. Should you be willing to participate and respond to this request, an informed consent form will be emailed to you for your review and signature. Once you complete the consent form, you may return the form to me by email. Please let me know if you have any questions regarding the information and request. You may contact me via email or by telephone.

Thank you for your consideration in potentially participating in the study.

Sincerely,
Jayco McCowan
Doctoral Student
University of Phoenix
Appendix B

Interview Protocol

Semi-structured Interview Protocol Form

Study: Talent Management Leaders Strategies’ for Millennial Senior Leadership Roles: A Qualitative Case Study.

Date:______________ Time:______________ Location:____________________________

Informed Consent Signed?

Interviewer: Jayco McCowan Interviewee code: P____.

Interviewer notes to interviewee (Script):
I want to confirm with you that the confidentiality of your responses is guaranteed and that I may record the interview.

Permission to record: Yes_____; No_____. Date/Time__________.

Thank you for your participation. I believe your input will be valuable to this research and in helping provide further growth for developing strategies in advancing and preparing the next generation of Millennial leaders to senior leadership roles. In addition, your expertise will help galvanize strategies that can be beneficial to future leadership succession planning.

The approximate length of interview should be 1-2 hours focusing on questions based on your leadership development and experiences at the organizational level.

Methods of Cross-checking Information: Upon completion of the interview transcript, I will email your responses to you for confirmation of what you have provided. You will have the opportunity to make any changes or add information to your initial responses and send any revisions back to me for update and inclusion. Upon completion of the study, I will provide you a copy of the results of the study for your information.

Research Purpose: The purpose of the proposed qualitative single case study is to investigate strategies, healthcare talent management (TM) leaders currently have in place to advance Millennials to senior leadership positions (e.g. senior management and above) in the Houston, Texas metro area. Exploring current leadership development and advancement strategies healthcare talent management leaders implement may assist other healthcare and business leaders struggling with developing and implementing strategies for Millennial advancement to senior leadership roles. In addition, it may assist in understanding the potential gap or bottle neck (s) in leadership succession planning within the organization.

Participant Information: The criteria for participation is as follows:
- Served in leadership position for 5 years or more.
• You currently hold one of the following or similar titles- senior executive, management consultant, senior manager, division director, executive director, senior director, AVP, VP, SVP, chief officer, and/or a board of director member.

• You have a talent management (TM) responsibility in your current role e.g. you share the organization’s commitment to recruit, hire, retain, and develop talented or high potential employees.

• Your current/past work experience include the responsibility of developing and/or executing strategies that advance the next generation of leaders, Millennial (born between the years of 1977-1997) leaders into senior leadership roles.

Job Title: ____________________________________________________________

Number of Years/Months in Your Job: Years_____; Months_____.

Number of Years/Months in Senior Leadership Position(s): Years_____; Months_____.

<table>
<thead>
<tr>
<th>Original Interview Question</th>
<th>Final Interview Question w/Changes</th>
<th>New Question Position</th>
<th>Which Research Question Does the Interview Question Answer?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) What leadership development strategies does your organization use to prepare Millennials for senior leadership roles?</td>
<td>What leadership development strategies does your organization use to prepare Millennials for senior leadership roles?</td>
<td>1</td>
<td>RQ1</td>
</tr>
<tr>
<td>2) How do you identify gaps in senior leadership roles and what solutions do you have in place for succession planning involving Millennials and the next generation of leaders?</td>
<td>What strategies do you have in place for succession planning involving Millennials and the next generation of leaders?</td>
<td>2</td>
<td>RQ 1</td>
</tr>
<tr>
<td>3) How are your preparing your organization for the generational shift in senior leadership?</td>
<td>How are you preparing your organization for the generational shift in senior leadership?</td>
<td>3</td>
<td>RQ1</td>
</tr>
<tr>
<td>4) What strategies are used to facilitate knowledge transfer to Millennials to reduce the knowledge gap and leadership deficiencies created by the retiring Baby Boomers?</td>
<td>What strategies are used to facilitate knowledge transfer to Millennials to reduce the knowledge gap and leadership deficiencies created by the retiring Baby Boomers?</td>
<td>4</td>
<td>RQ1</td>
</tr>
<tr>
<td>5) What strategies are used to train and engage Millennials for senior leadership roles?</td>
<td>What strategies are used to train and engage Millennials for senior leadership roles?</td>
<td>5</td>
<td>RQ1</td>
</tr>
<tr>
<td>6) What barriers is your organization experiencing in advancing Millennials to senior leadership roles?</td>
<td>Are there any barriers or challenges your organization experience in advancing Millennials to senior leadership roles?</td>
<td>6</td>
<td>RQ2</td>
</tr>
<tr>
<td>7) What innovative strategies does your organization incorporate to prepare Millennials for senior leadership roles?</td>
<td>Are there innovative strategies your organization incorporate to prepare Millennials or the next generation for senior leadership roles?</td>
<td>7</td>
<td>RQ1</td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
<td>Page</td>
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<td>8) What strategies does your organization use to prepare Millennials for senior leadership roles that may be different from other generational cohorts (i.e. Traditionalist, Baby Boomers, and Generation X)</td>
<td>If there are barriers that may delay succession planning for Millennial leadership advancement to senior leadership roles, what strategies are used to mitigate these challenges?</td>
<td>8</td>
<td>RQ2</td>
</tr>
<tr>
<td>9) How is your organization incorporating strategies that mitigating barriers that may delay succession planning for Millennials leadership advancement to senior leadership</td>
<td>Have you experienced any barriers that may have affected the need to prepare the Millennial generation for leadership?</td>
<td>9</td>
<td>RQ2</td>
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Appendix D

Top Preliminary Themes

<table>
<thead>
<tr>
<th>Themes</th>
<th>P1</th>
<th>P2</th>
<th>P3</th>
<th>P4</th>
<th>P5</th>
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<td>RQ1: How do non-profit healthcare TM leaders develop strategies to advance Millennials to senior leadership roles in healthcare systems?</td>
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Appendix E

Theme 1

Theme 1 and Direct Participant Statements

<table>
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<tr>
<th>Theme 1</th>
<th>Pre-codes/ Key Words</th>
<th>Excerpts from Participant Responses to Support Theme</th>
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<tbody>
<tr>
<td>Lack of leadership development strategies at the organizational level specifically for Millennials.</td>
<td>Leadership Programs Strategies</td>
<td>P1- “In general, I would say what our organization does as a whole, not just for Millennials is they strive to make sure that people have access to professional development by bringing in external speakers, and those type of things related to professional development.” P2- “Well, for one thing, we don't just target and Millennials, we have programs for anyone in a particular role.” P5- “As an organization, I don't think we’ve done that on a deliberate basis.” P6- “To my knowledge there aren’t any leadership strategies that we use to prepare a targeted group such as the Millennials. P8- “We don't have a formal process in place as an organization, no.” P9- “At this time there are no leadership development strategies that target Millennials.”</td>
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## Appendix F

### Theme 1: Sub-theme

*Theme 1 Sub-theme and Direct Participant Statements*

<table>
<thead>
<tr>
<th>Sub Theme</th>
<th>Top Pre-codes/ Key Words</th>
<th>Excerpts from Participant Responses to Support Theme</th>
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<tbody>
<tr>
<td>Leadership development strategies are conducted on departmental level.</td>
<td>Programs</td>
<td>P1- “In <em>(Department Name Omitted)</em> alone, something that we do to strive to develop our leaders is host webinars and encourage our staff to realize that they don't have to be in a leadership position to be a leader. We really focus on letting them lead group projects, letting them focus on their jobs, and let them focus on the fact that they have leadership roles within their jobs even though they may not have the leadership title across the board in <em>(Department Name Omitted)</em>. There is a program that we have in partnership with <em>(Department Name Omitted)</em> called Illumin-8. And it’s a three-day workshop with other peers taught by peers. I think Illumin-8 is a great innovative strategy because it was grassroots and it was developed by a couple of managers who thought, ‘this is a gap we are missing’. We think this is a great way for people to identify themselves as leaders without the leadership title. They can realize that they can lead in</td>
</tr>
</tbody>
</table>
other ways.”

P4- “I'll go back to that whole idea of shadowing. The other thing is, you know, in certain situations I may be working on a project or working on some project and in tandem I may ask someone else to give it a shot as well, you know, so we can kind of see, you know, what they would come up with. You know, in order to kind of say, if I weren't here, how would you approach this?”

P5- “Just like I'm doing that on my team, on the first things that I do when I walked into this role is really assess who do I have, who's on my team and the begin to observe, you know, assess in what their strengths are. I'm a big believer that you leverage strengths. You don't try to, you know, show weaknesses necessarily. But then identify when I retire, who do I want to start preparing? And I've done that in my department. And then creating job enrichment, job expansion opportunities, and really challenging people. This is done on an individualized level; because I've achieved what I've wanted to achieve in my own job, I want to make sure that I'm creating a space for people to step into opportunities that I no longer need exposure. I need to clear the path for them to get exposure. So that is having them present at senior leadership, having them take the lead on a project and get comfortable with risks, identifying solutions to a problem, and then having them present those recommendations to senior
leadership. So, it's through their normal work, that allows them to grow in that job and begin to do some of the things that I would typically do in my job. When the opportunity presents itself, they've got that experience. And I think that's what leaders across the organization should do.”

P7- “I'm also proud within our division that all of the training programs are voluntary. Like you must, sort of opt in. It's not, we often joke, it's not voluntold, where you're necessarily nominated. We run a number of the programs off, like personal reference but each person has to want to commit. Now there are still people within the department who say we don't get training and everything else, but you really have to, you have to ignore a lot of opportunities to not get a training in some realm. The one I wanted to mention, we actually call, Illumin-8. It's a follow-up to Breakfast Club, it's like the next iterations of Breakfast Club being a topic discussion or a book club for one hour a month. Illumin-8 expands on that, in three facets being a full day focused on self, like emotional intelligence, and other self-focused introspective topics; it's three days over three months.”

P10- “There has been discussion of job shadowing and talent reviews to identify what potential is there for development. And so those have been floated around; job shadowing hasn't been implemented, but the talent reviews have, so looking at potential in those Millennials to see
what can be further developed and identifying if there is interest. Because I can say you have this knowledge we need in this area, but that may not be an area that person is interested in pursuing. So, kind of going down that path of talent reviews, and understanding where a person's career path is.”

P11- “One strategy is to encourage them to get involved and engaged in their own personal development.”
### Departmental/Area Programs

<table>
<thead>
<tr>
<th>Program Name</th>
<th>Program Description</th>
<th>Area</th>
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<tbody>
<tr>
<td>Illumin-8</td>
<td>A 3-month program that highlights holistic leadership. The objective of this workshop is to encourage self-focus, team focus, and leadership focus.</td>
<td>Academia and Business</td>
</tr>
<tr>
<td>The Breakfast Club</td>
<td>A one-hour monthly “book” topic that is discussed face-to-face and/or via Skype. Participants are encouraged to read the chosen book for the month for discussion among colleagues. While not too many people are familiar with this program anyone can be a part of it.</td>
<td>Business</td>
</tr>
<tr>
<td>IS Fellowship</td>
<td><em>Cited from the departmental/area website.</em> This program provides emerging professionals with practical skills and experience that will prepare them to support an Academic Medical Center with Informational Technology needs. The program will grow and retain high skilled and diverse technology professionals that are competent to bring value to the organization.</td>
<td>Business</td>
</tr>
<tr>
<td>Administrative Fellowship</td>
<td><em>Cited from the departmental/area website.</em></td>
<td>Healthcare</td>
</tr>
</tbody>
</table>
The Administrative Fellowship Program provides recent graduates from an accredited MHA program or similar degree plan with the opportunity to begin a successful career in healthcare administration. The fellow will apply the knowledge gained in the classroom to real-world situations and explore hospital operations through the completion of a wide range of projects, and further develop essential leadership skills through project management. The fellow receives mentorship from the Vice President of Health System Operations & Regional Hospitals.
Appendix H

Theme 2

Theme 2 and Direct Participant Statements

<table>
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<th>Theme 2</th>
<th>Top Pre-codes/ Key Words</th>
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<td>HR Leadership development programs are open to all generations.</td>
<td>Programs</td>
<td>P1- “In general, I would say what our organization does as a whole, not just for Millennials, is they strive to make sure that people have access to professional development by bringing in external speakers and those type of things related to professional development.</td>
</tr>
<tr>
<td></td>
<td>Leadership</td>
<td>P2- “…we have a program, Coaching for Emerging Leaders. And that program is targeted more for emerging leaders, i.e. mostly Millennials. Um, I would say that that is pretty much the strategy that we are doing.</td>
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<tr>
<td></td>
<td>Strategies</td>
<td>P3- “Well, for one thing, we don't just target and Millennials, we have programs for anyone in a particular role. We have basically three buckets of development. One is for employees, the other for managers, and then the rest force directors in the boat, which we term, executives.”</td>
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| | | P4- “I would say that, strategies like leadership programs that HR have put into place, that we as leaders are able to nominate, individuals, within our areas of responsibility to attend in order to become prepared for growth roles and development. I think that is, probably here at our organization, the route we normally
take at an organizational level.”

P5- “We have instituted the Coaching for Emerging Leaders Program, which was originally targeted to hit the Millennial group knowing that we had a gap in their development. Obviously, you know, we've opened it up to other participants as well.”

P7- “As an organization, we also have two other programs in conjunction with our HR department. That's coaching for emerging leaders and the formally, they're working on revising it, but it was the Foundational Management Training Program, to do formal management training.”

P8- “We have coaching for emerging leaders, that's probably going to be the main program that we have that will train the next generation for possible senior leadership roles. That program does not target Millennials out right, but I would say Millennials will probably be in that group.”

P9- “Currently there is a program called Coaching for Emerging Leaders. This program targets high potential leaders and connect them with executive leaders. This program helps train the next generation of leaders and I believe that Millennials are apart of this group. But with that program you have to be chosen by an executive, it is an exclusive program. Another program is the FMTP, but you have to be a manager to get into that program, but I am sure Millennials
partake in that training program. Both programs are led by the HR department.”

P10- “We previously offered a management training program, a foundations of management training program, which was about 10 courses that gave a foundation to assist in preparing managers for a leadership role.”

P11- “From an organizational level, the institutions have implemented a "My Road Ahead". This is a requirement of not only Millennials, but all employees are required to have a development goal. There is also foundational management training program offered. Another program has changed names a couple of times, but if I'm not mistaken, it’s still called Emerging Leaders program.”
### Appendix I

**Theme 3**

**Theme 3 and Direct Participant Statements**

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</table>
| There are no organizational strategies to mitigate barriers for Millennial leadership advancement. | Succession Planning, Leadership Development, Barriers | P2- “Well, I think the biggest challenge there is kind of like a vicious circle. The dog chasing the tail. Cause we have the people who are retiring or who are leaving for whatever reason. And instead of having a succession plan to put someone in that role, we are just eliminating those positions and dividing that one person's high salary into two or three lower paying salaries.”  
P6- “The organization must be aware of the generational shift and they have to be understanding. If there is a failure to identify and value that this inevitable shift is happening, then that serves as a barrier for being able to have programs for Millennials to have programs to transition into these senior roles’ leadership roles”  
P8- “Sometimes there are barriers like lack of resources, finances, and opportunity that you just cannot escape as a leader. I would say that we just need to be more proactive and have some initiatives in place. Currently, we have no formal strategies that is being used to mitigate these challenges.”  
P9- “Sad truth but there are no strategies in place to mitigate any
challenges that I can think of at this time from an organizational perspective.”

P10 - “I don’t think there are strategies currently in place to mitigate. I think that it's just a sign of the time. There is definitely a war for qualified talent and so it's not an option to not only develop leaders internally but to even compete for Millennial leaders.”

P11 - Employees may not be given the flexibility they need or may be told to work on things that may help them advance but on their own time. This barrier is there for some while others are propelled ahead because of who they know, or their kinship creating inconsistent practices and weakens fair opportunities for many aspiring leaders.”
Appendix J

Theme 3 Sub-theme 2

Theme 3 Sub-theme and Direct Participant Statements

<table>
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<td>While there is no official leadership succession plan in place, there is an interest in developing one at the organizational level.</td>
<td>Succession Planning, Leadership Development, Barriers</td>
<td>P1- “I think one of the critical things with the whole relationship between Millennials and succession planning and leadership is realizing one, how broad the Millennials are in an age range because I think a lot of people when they hear Millennials they still think of the 20 somethings and they are not Millennials, I mean the ones in high school are not considered Millennials, so you can’t lump them in with the same generation.”</td>
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<td>P3- “We need to do succession planning. Without a doubt. We do need to do that because the older generation is retiring. And that's the reality of right of it, right? So, if we say 25% of our organization is eligible to retire in the next five years, is some quick math would be, you know, that's a quarter of our folks, which is about 4,000 people. Um, that's a lot.”</td>
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<td>P5- “It goes back to the resources. I think what we need to start is, what's our position on just succession planning to begin with? And then ask the question, what are the unique needs of our different populations of leaders and potential leaders? And Millennials are a part of that.”</td>
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<td>P6- “You do, want to kind of have...”</td>
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planning. If you were to recruit for a position, when you are recruiting look at what the deficits are in that process, implement some type of evaluation process of the recruiting process, and then formulate a plan and implement changes that are necessary. I feel like that would be what's best, even if that's not what's currently done.”

P7- “There definitely are some barriers specifically with succession planning. So even in my department, we have retirees coming up now, recently, literally one last week, one I've got another one at the end of the year. And so, it's going to start to become more and more of a trend where you're losing decades of experience that you just can't replace. With the pace at which it specifically and it feels like the world changes. I'm replacing anyone with notable expertise is becoming increasingly difficult. The one thing we can do is try and prepare ahead of time.”

P8- “I think there is still a stigma with Millennials, and we have to get rid of the stigma through educating ourselves about all generational workforce make-up especially the Millennials. I say Millennials specifically because of their huge presence, I read they are the largest generation. I think it's time that we start preparing them because they are not children anymore.”

P10- “To keep your organization moving forward, you have to be able to develop them because it definitely costs you way more to hire them.”