BRIEFING NOTE

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The City & Guilds Centre for Skills Development (CSD) is an independent, not for profit research and development body which is committed to improving the policy and practice of work-related education and training internationally. It is part of the City & Guilds Group.

This briefing note forms part of a series of notes produced by CSD on issues affecting the global vocational education and training sector. These notes aim to briefly summarise and compare existing research, policy and practice in different countries, and to use this to develop general principles as a starting point for debate among education stakeholders. For more comprehensive information on specific issues please refer to the further reading sections of the notes, or contact CSD directly.
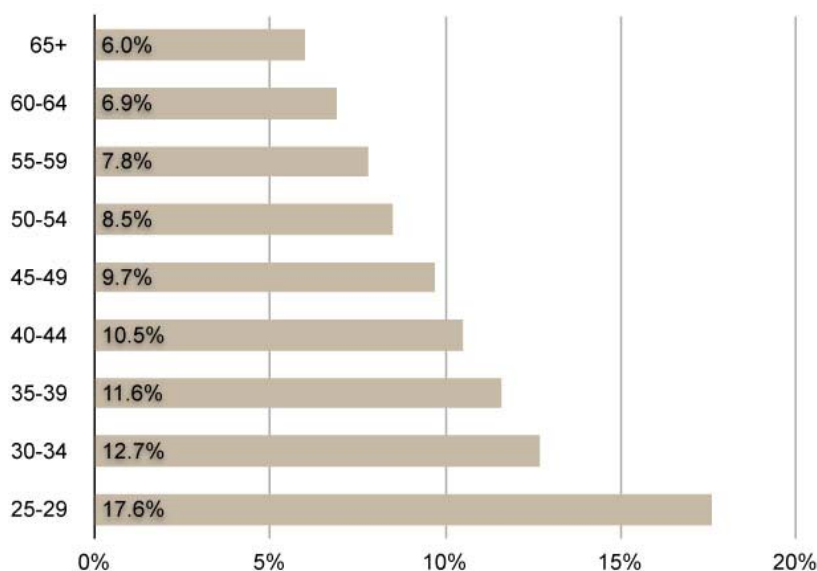
OLDER LEARNERS IN THE WORKPLACE

1. INTRODUCTION

Older workers, defined here as those aged 50 and above, are less likely to have access to training and development opportunities than younger workers, and are also less likely to engage in learning if the opportunities are available to them. The growing proportion of older people in the workforce, and their increasing propensity to work through to and beyond the official age of retirement, suggests that supporting the skills development of older workers will hold long-term benefits for employers and society alike.

Figure 1: Participation of EU-25 Labour Force in Education & Training by Age Group

2. WHY TRAIN OLDER WORKERS?

Demographic Changes

The proportion of older workers in the developed world is growing steadily. In the UK, for example, older workers as a percentage of those in employment has risen from 22% to 28% in the last 15 years, and is projected to grow to 32% by 2020[1]. These demographic changes mean that use of older talent will need to be maximised.

Changing Working Practices

Many older workers are at the height of their career, not at the end of it, and will continue to contribute through voluntary and part-time employment beyond their date of official retirement[2]. According to a survey of over 8,000 employees across the G7 countries[3], over one third of older workers expect to continue working in some capacity during retirement4. Training can help to keep older workers in the labour market for longer[5].

Direct Impacts on Businesses & Individuals

Cedefop highlights a mismatch between the skills of older workers and the skills needed by their employers, which can have negative effects on productivity, wages, labour turnover and job satisfaction[6]. Older workers are less likely to receive training than their younger counterparts[7], which compounds the impact of skills mismatches for both employers and individuals.

Companies have experienced improved retention rates through tailoring training to older workers. In Australia, for example, Aurora Energy loses only 1% of its staff each year, which it attributes to its age-friendly practices. These include the promotion of further training and development in performance management, and the implementation of recognition and reward programmes for skills development[8].

3. DIVERSITY

Older learners are often perceived as having similar needs and aspirations to each other. Older adults in education journals, for example, have often been portrayed as a homogenous group in terms of age, gender, race, class, ethnicity and able-bodiedness[9]. While general recommendations can be drawn out for older learners, employers, practitioners and policy makers must exercise caution and recognise that they are not a uniform group with uniform needs. Likewise, employers do not necessarily treat all older workers in the same way.

Individual Differences

Many elements play an important role in determining the specific needs of older learners, including gender, able-bodiedness and levels of previous learning. Older women, for example, many of whom are concentrated in service industries[10], tend to set high goals for themselves and to require affirmative feedback from their instructors[11], while men tend to have higher levels of previous education and to work in manufacturing and trades[12]. As with any group

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[1] Calculations were based on National Statistics time series data (labour market status by age group). Projections were calculated by applying the average proportional change over the past 15 years to future years.

[2] Foster, S. (2008). *Mature Age Learners and Workers: A Review of the Literature.* Melbourne: Work-Based Education Research Centre, Victoria University.

[3] The G7 countries are France, Germany, Italy, the UK, Japan, the USA and Canada.

[4] Towers Perrin (2007). *Profit from Experience: Perspectives of Employers, Workers and Policymakers in the G7 Countries on the New Demographic Realities.* Washington: AARP.

[5] Fouarge, D. & T. Schils (2009). The Effect of Early Retirement Incentives on the Training Participation of Older Workers. *Review of Labour Economics & Industrial Relations 23:* 85-109.

[6] Cedefop (2010). *The Skill Matching Challenge: Analysing Skill Mismatch and Policy Implications.* Luxembourg: European Union.

[7] See above under Figure 1.

[8] Foster, *Op. Cit*.

[9] Chen, L.-K., Y. Kim, P. Moon & S. Merriam (2008). A Review and Critique of the Portrayal of Older Adult Learners in Adult Education Journals, 1980-2006. *Adult Education Quarterly 59*(1): 3-21.

[10] Foster, *Op. Cit.*

[11] Wolf, M. (2009). Older Adult Women Learners in Transition. *New Directions for Adult and Continuing Education 122:* 53-62.

[12] Foster, *Op. Cit.*

of learners, however, strong differences exist between individuals. According to Foster, age is too simplistic to allow for any meaningful understanding of older learners' aspirations or needs: *'some are at the peak of their personal and professional abilities and achievements, others are among the most vulnerable experiencing multiple areas of disadvantage in the labour market, suffering deteriorating health or changes in their lifestyles'*[13].

Differences in learning ability between individuals become greater with age[14]. Individual characteristics, which are important considerations for all learners, must therefore receive even greater consideration in the delivery of training programmes for older learners.

Career Intentions
Career intentions can have a significant impact on the learning behaviour of older workers; older workers in bridge jobs, which are jobs between one's long-term career job and permanently exiting the workforce, are less likely to engage in development opportunities and more likely to perceive their job as offering fewer development opportunities than those in career jobs[15].

Sector & Organisational Differences
Differences exist in the content, quality and amount of training offered to older workers across different sectors. Retail and hospitality are the sectors in which learning for older workers is perceived as being the most important[16]. UK workers of all ages are more likely to have received training in public administration, education and health[17].

4. BARRIERS

Beliefs of Employers & Individuals
Stereotypes among employers are prevalent. Popular stereotypes include the beliefs that older workers do not want to learn, they cannot learn, they have great difficulty learning new technology and an investment in their training provides a poor return[18].

While employers are less likely to offer training to older workers, older workers themselves are less likely than other age groups to take it up. With lower average levels of school and post-secondary qualifications, older workers can have insecurities about going back to learning at a later age. They may also have legitimate concerns about being able to 'compete' in the workplace learning environment, with lower literacy, numeracy and related skills[19].

Mismatch with Learner Needs
A 2007 survey suggested that 44% of older workers within the G7 countries are given the opportunity to train and develop their skills, and yet only 19% of this group find these helpful[20]. Older workers also demonstrate lower outcomes from workplace learning than their younger colleagues, with fewer reporting that they have learned new skills, experienced any increase in employability or achieved improved ability to advance in their careers[21].

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[13] Foster, *Op Cit.*

[14] Maurer, T. (2007). Employee Development and Training Issues Related to the Aging Workforce. In K. Shultz & G. Adams (Eds) *Aging and Work in the 21st Century.* New Jersey: Lawrence Erlbaum Associates.

[15] Armstrong-Stassen, M. & F. Schlosser (2008). Benefits of a Supportive Development Climate for Older Workers. *Journal of Managerial Psychology 23*(4): 419-437.

[16] Towers Perrin (2007). *Profit from Experience: Perspectives of Employers, Workers and Policymakers in the G7 Countries on the New Demographic Realities.* Washington: AARP.

[17] Newton, B., J. Hurstfield, L. Miller & P. Bates (2005). *Practical Tips and Guidance on Training a Mixed-Age Workforce.* Sheffield: Age Partnership Group.

[18] Gray, L. & J. McGregor (2003). Human Resource Development and Older Workers: Stereotypes in New Zealand. *Asia Pacific Journal of Human Resources 41*(3): 338-353.

[19] Chappell, C., G. Hawke, C. Rhodes & N. Solomon (2004). *Major Research Program for Older Workers: Stage 1 – The Conceptual Framework.* Sydney: The Australian Centre for Organisational, Vocational and Adult Learning.

[20] Towers Perrin (2008). *Investing in Training 50+ Workers: A Talent Management Strategy.* Washington: AARP.

[21] Ewell, P., P. Kelly and R. Klein-Collins (2008). *Adult Learning in Focus: National and State-by-State Data.* Chicago: Centre for Adult and Experiential Learning.

Social Capital

Social networks are thought to decay with time, meaning that older workers tend to have fewer opportunities to receive support from co-workers, supervisors and others. This decreased support may combine with negative stereotyping and internal changes to lead to a decreased tendency to engage with learning[22].

Age-Related Effects on Learning

Age-related barriers to learning can include a reduced ability to engage with rote learning, fast paced presentation and multiple tasks[23].

5. PROGRAMME DESIGN

E-Learning

Supplementing work-based learning with formal e-training programmes for older workers can help build a constructive relationship between employer and employee beyond the formal retirement age of 65, avoiding the loss of important skills[1].

Where it is not possible to bring learners together, the use of paper-based 'How to get started' instruction booklets with screen shots and instructions in simple jargon free language will help learners get up to speed with the technology and web interfaces. This is particularly true for older learners as their comfort level and familiarity with paper documentation is high and readily fits their mental model of instructional texts.

Strategies for computer-based learning targeted at older learners include[1]:
- Using a data projector (visual demonstration supports the learning style of many older learners).
- Providing a well equipped and managed computer room, making computers available outside of regular session times.
- Demonstrating self help strategies early in the course (e.g. switching the computer off and resetting it).
- Using every day metaphors to demystify computer concepts (e.g. 'you don't need to know how to drop in a carburettor in order to drive a car').

The US-based National Institute on Aging and the National Library of Medicine have developed guidelines aimed at older users of technology. These are based on an assumption of vision problems rather than cognitive decline, and include using only sans serif fonts, using 12 or 14 point font size, using double spaced text and left justification, avoiding the use of yellow, blue or green in close proximity, avoiding patterned backgrounds, inserting text alternatives for all graphics and using consistent layout. Usability alone, however, is insufficient; older learners also need interesting and engaging material, together with good aesthetics[1].

Structure and Presentation

Older learners respond better to informal learning than formal[24]. Programmes should be presented at a slower pace, allowing extended discussion and repetition, take existing skills into consideration[25]. Mixing classes with their younger counterparts and incorporating both group and independent work are in keeping with older learner preferences[26]. Older learner confidence can be increased by incorporating their previous experiences into any training programmes and taking into account their personal interests, whilst avoiding any potentially competitive situations within the learner group.[27]

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[22] Maurer, *Op. Cit.*

[23] E.g. Duncan, C. (2001). Ageism, Early Exit, and the Rationality of Age-Based Discrimination. In I. Glover & M. Branine (Eds) *Ageism in Work and Employment.* Aldershot: Ashgate Publishing.

[24] Berg, S. & S. Chyung (2008). Factors that Influence Informal Learning in the Workplace. *Journal of Workplace Learning* 20(4): 229-244.

[25] Foster, *Op. Cit.*

[26] Pincas, A. (2007). How do Mature Learners Learn? *Quality in Ageing and Older Adults 8*(4): 28-32.

[27] Dworschak B., H. Buck & A. Schletz (2006). Building Workplaces in Line With the Ageing Process. In T. Tikkanen & B. Nyhan (Eds*) Promoting Lifelong Learning For Older Workers: An International Overview.* Luxembourg: Office for Official Publications of the European Communities/Cedefop.

Positive effects on training outcomes for older learners are seen in[28]:

- Active participation by the learner in discovering how to perform the task under consideration.
- Use of the lecture method (although other research contradicts this).
- Use of modelling, through which learners are given the opportunity to watch another successfully perform the task under consideration.
- Learners' self-pacing, which was found to have the greatest impact.

Formal assessments are also less desirable to older learners[29] and fear of assessments can be reduced through the use of self-assessment methods[30]. As older learners sometimes find it easier to remember the overall message of a text, rather than detail, assessments for older learners should include[31]:
- Multiple choice questions, requiring recognition memory.
- Essay questions, requiring the learner to discuss key points or the overall subject area more broadly.
- Sufficient time, allowing older learners to recall the required information and detail.
- The provision of examples, adding meaning to subject areas.
- Large print reading materials.

6. RECOMMENDATIONS

General
Negative stereotypes present the main challenges for older learners in the workplace and should be tackled. The Business, Work and Ageing Centre for Research[32] suggests stressing the following to change perceptions:

- Older workers can use experience and skills to offset any decline in performance due to ageing.
- The idea of general intellectual deterioration that impairs performances with age is not sustainable.
- When learning programmes are tailored to the age, knowledge and experience of older workers, learning is just as effective and no more expensive than for younger workers.
- The goal of older workers is not necessarily to retire.
- Older workers are interested in undertaking training and furthering their careers.

Training should be as much a part of older workers' professional lives as their younger colleagues.

Employers
- Ensure that **age stereotypes** within the organisation are addressed. This could be in the form of programmes to counter stereotypes and audits to ensure that older workers are being treated similarly to younger workers, and have the same access to training opportunities.

- Develop **training frameworks for all employees**, regardless of age, which outline the skill requirements of each role to ensure that relevant training is undertaken.

- Consider **targeting learning programmes at older workers**, as they are less likely to participate in training than younger learners when such programmes are available. Work with individuals to ensure that age-related barriers to participation in learning programmes are addressed. This might include peer group support and mentoring programmes to ensure that older learners have the social support they need to participate, and the encouragement of those who have undertaken training to share their positive experiences with others.

- Consider good practice in training for all learners. This should include training in job-specific skills as well as general employability skills, and the promotion of a **culture of continuing learning and development** throughout the organisation.

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[28] Callahan, J., D. Kiker & T. Cross (2003). Does Method Matter? A Meta-Analysis of the Effect of Training Method on Older Learner Training Performance. *Journal of Management 29*(5): 663-680.

[29] Ferrier, F., G. Burke & C. Selby Smith (2008). *Skills Development for a Diverse Older Workforce.* Adelaide: NCVER.

[30] Foster, *Op. Cit*.

[31] Foster, *Ibid*.

[32] Cited by Foster, *Op. Cit.*

- Working closely with practitioners, ensure that the **needs of older learners** are considered in **training design**. This could incorporate learning among people of a similar age, peer support, lower intensity training, a focus on practical knowledge and the promotion of clear job-related outcomes, self-paced and independent learning, offering the opportunity to practise skills as they are learned, and ensuring an informal learning environment.

Practitioners
- **Do not treat older learners as a homogenous group**. Greater variability in learning ability between individuals among older learners also suggests that individual characteristics play a greater role than they would among younger groups of learners. Good training for older learners is essentially the same as good training for other groups – it focuses on the needs of the individual and does not make assumptions about the group, and is both flexible and responsive.

- **Independent, informal and self-paced learning, with a practical** rather than theoretical **focus**, should be priority methods for older workers. Learning activities might include collaborative and practical activities, group work and independent work, and the use of learners' previous experience and case studies. Sufficient feedback should be offered, together with the use of learners' existing knowledge and experience.

- Ensure that **learning outcomes are closely integrated with work** and necessary job skills, and communicate this to older learners to ensure that they feel the learning programme is both useful and relevant to their needs.

- Ensure that **accessibility** is incorporated in the development of learning resources, such as larger print size.

Policy Makers
- **Campaigns directed at perception change** may be the key role for policy makers to play in improving the provision of training for older learners. Age stereotypes are a major barrier both to the provision and take-up of training by older workers, and large-scale campaigns to challenge perceptions can be an important way of initiating change as the workforce grows older.

- Consider the use of **direct funding incentives** to encourage employers to train their older workers.

- Ensure that **age discrimination laws are fit for purpose**, and that employers do not have the option of creating business cases for not training their older workers.

- Work with researchers and employers to develop a better understanding of how best to manage an ageing workforce, looking at **flexible working, phased retirement planning and skills transfer** to ensure that the older workforce is trained and effective and that valuable skill-sets are not lost as employees reach the age of 65.

7. RECOMMENDED FURTHER READING

Foster, S. (2008). *Mature Age Learners and Workers: A Review of the Literature*. Melbourne: Work-Based Education Research Centre, Victoria University.

Towers Perrin (2007). *Profit from Experience: Perspectives of Employers, Workers and Policymakers in the G7 Countries on the New Demographic Realities*. Washington: AARP.

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