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Chapter 10 Professional development for older colleagues

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The population in Sweden is living for longer and is healthier than before. As a consequence of this, the proportion of older people in the population is on the increase. In 2015, almost one in five people were over the age of 65. In 2060, it is calculated that one in four people will be over 65 years of age (SCB, 2016). Similar demographic changes are underway in many other countries. In the EU, the aging population is one of the most pressing social issues. The changing composition of the population will influence how companies will work on professional development within their organisations. A large number of older people have considered working for longer, past the pensionable age, but as the situation looks like now, there are a number of issues that must be solved if such a change is to be implemented with good results. There is a fear that those individuals who are ill or 'worn out' might land in a more difficult situation if they are forced to work past the pensionable age, or that those individuals who wish to continue to work will not be allowed to because of legislation or age discrimination (Bjursell et al., 2014).

This highlights a central issue about an extended working-life; namely, the importance of professional development of older workers, so that they can be better utilised within the organisation. In the Swedish *Pensionsåldersutredningen* (SOU, 2013: 25 'Retirement Age Investigation'), it is stated that an important part of an extended working-life is to provide opportunities for older workers to maintain and develop their professional competencies. This entails that a review of the relevant structures and systems with respect to professional development must take place, both in society and in organisations. Organisations should be aware of the issue of age so as to satisfy its employees' needs during different stages of their life. To offer professional development during a person's whole working life is a strategic issue for the HR department to address, and this issue demands insight into how professional development for older employees can be encouraged and structured appropriately. In the present chapter, I will demonstrate how this can take place and offer up arguments as to why older employees should be included as a relevant dimension of the strategic arrangements for professional development, from the perspective of the organisation.

Why invest in older employees' professional development?

When the issue of age is discussed in organisations, the points touched upon often include age discrimination, pension systems, or an unwillingness to invest in professional development for someone who is in the latter half of their working life or is close to retirement. In conjunction with the increasing interest from the government to raise the retirement age, it has become clear that we need changes in our current systems, attitudes, and way in which work is organised. The conditions to which older employees are subject need to change with respect to opportunities for study-support and access to careers advice (SOU, 2013: 25). Furthermore, adult education and labour market education systems need to be revised so as to better satisfy the needs of older employees. There are several arguments that propose that we take the issue of older employees' learning and training seriously. The workforce, irrespective of age, is faced with more and more unpredictable changes, and it is probably going to be more common that one's retirement will take place in the form of a 'phasing out from the labour market'. Thus, the adaptation and 'employability' of the current workforce will become just as important as the recruitment and introduction of new employees within an organisation (Field & Canning, 2014).

From the organisation's perspective, there are several advantages in caring for one's older employees. Older employees are often loyal to the organisation, reliable, service- and customer-orientated, possess institutional knowledge, follow a work ethic, have life experience, and are productive (Wells-Lepley et al., 2013). This cohort is generally physically and cognitively better equipped that previous generations (Swedish Government, 2014), and the provision of professional development and other learning opportunities will allow the individual's skills to be retained, if not increase such skills (Mehrotra, 2003). In Table 10.1, a number of arguments for arranging the further education, training, and professional development of older employees are summarised.

Table 10.1 Arguments in favour of arranging professional development opportunities for older employees.

Organisations are faced with an increasingly diverse workforce in terms of age.

Older employees, as a group, are physically and cognitively better equipped that previous generations, and many wish to continue working.
Continual learning can contribute to maintaining or reinforcing and individual's health, knowledge, and preparedness to learn.
Demands for new knowledge and skills are constantly being made, which creates a situation where the workforce should be continually 'upgraded'.
Older employees are often stable individuals, who are loyal and productive.
The older members in an organisation constitute an important source and distribution point of knowledge within the organisation.

Arguments against arranging educational opportunities for the older employees are based on an assumption that such arrangements give a lower return on investment, since the older employees (as a group) have a shorter time left in the organisation (when compared with the younger employees (as a group). In today's employment market, it is, however, quite usual for an employee, irrespective of age, to change employers several times during the course of their career. In the context of 'older employees', clarification should be provided about which age group one is actually referring to. In fact, two groups are included; those who are actually pensioners but are considered to be a potential source of labour, and those who are in the latter half of their work-life. In the following section, the concept of 'age' is dealt with.

Who is 'older'?

The definition of who is 'older' or an 'older employee' is dependent on the context. In a primary school context, pupils who are in high school are older, whilst in later life individuals can be divided into 'old' after the age of 65, and 'elderly' after the age of 80. Studies into the learning that older people engage in usually examine learning that takes place after retirement. With respect to the context of one's work-life, the age of 65 is a pivotal age in Sweden, because this age is associated with the time when one comes to the end of one's working life. 'Older' in the context of work-life is defined in relation to this time-point. The Retirement age investigation (SOU, 2013: 25) has suggested increasing the retirement age, and there are now changes being made in this area which may well

influence viewpoints on age in the work-life. Opportunities for education and learning are prerequisites for such changes.

A number of studies of older workers use different definitions of who is to be considered as 'older'. One study of Irish directors defined 'older' as including a wide range of ages; from 28 to 75 years old. This is somewhat unexpected when one thinks of another more common categorisation which states that older employees are 40 plus years old (McCarthy et al., 2014). The results of the Irish study could be partially explained by the fact that the Irish directors who were asked about older workers used their own ages as reference points. This is not surprising, but should be a factor which is taken into consideration before any relevant organisational decisions are made. With respect to access to professional development it is best to provide a broad definition of those who might be included in the group: 'older employees'. An important reason for this is that if the definition of 'older employee' include employees who are in the middle of their work-life then it is possible to work proactively with arrangements to raise competencies and skills for the employees (Ilmarinen, 2001).

One alternative to solely focusing on the chronological age of the employee is to speak of 'life stages', and well as a 'third' and 'fourth age'. Another variation on this theme is to speak of different 'generational cohorts', instead of specific ages. In today's work-life, up to five generations might work together, which may entail a great number of challenges for the HR department (Roodin & Mendelson, 2013).[1] To make proper use of the different strengths that the different generations may possess in an organisation, organisations should consider the following questions:

• How can unique, and sometimes competing, strengths in each generation be dealt with?
• Which strategies will increase each generation's productivity?
• Which strengths do older and younger employees contribute to the workplace?
• Can mentorship, coaching, or knowledge transfer contribute to intergenerational learning in your organisation?

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[1] The reader is also referred to Chapter 9 for a deeper discussion of intergenerational learning.

Other ways of defining 'age' in addition to chronological age, include functional age, psychological age, organisational age, and a life-cycle perspective on age (Sterns & Miklos, 1995; Kooj et al., 2008). I will not explore further these various ways of categorising people in terms of 'age', but the point has been made that this can be done by using various points of reference. From an organisational perspective, one should consider carefully what consequences different definitions may have to arrangements that are made with people's age in mind. It is also necessary to adapt the older employees' professional development to the individual's and the organisations unique characteristics. The benefit to be had from speaking of 'different age groups' is that it makes clear to the HR department that they can work in parallel with adapted strategies for the different generations.

Older employees' learning at work

There are only a few studies on professional development for older employees (Liu et al., 2011). The reason for this is because we are faced with a historically unique situation with the current age demographics. With respect to remaining at work, the physical work environment and psychological factors, such as preconceptions and attitudes towards older employees, are two areas that must be taken into consideration. The opportunities for learning that are offered to the individual employee are also important factors which may determine whether someone will remain in the work-life. Professional development, the work environment, and the employees' health are central areas in HR work, so it should be noted that when older employees engage in learning, this can have a positive effect on these areas. It can thus be a good idea to spend some time thinking about their needs.

It is now generally accepted that learning and professional development has moved on from being a matter related to the individual to something of importance for the organisation's development and even survival (Aronsson et al., 1996). The individual's educational level is the one factor which, to the greatest extent, influences participation in continued studies, and this factor gains even more influence as the person ages (Bjursell et al., 2017; Skaalvik et al., in Andersson & Tøsse, 2013). The higher the educational level the individual has achieved, the more probable that the individual will engage in continued education. One reason for this is that education develops the ability to search for and sort

through existing information about what is available in terms of professional development, hence these increased levels of participation (Mehrotra, 2003). Professional development, which is provided so as to reinforce and develop an individual's knowledge and skills, enables adaptation to and participation in the changes that take place in work-life. Professional development can provide specific knowledge and skills, which are needed in the short term, but in the long term, professional development can provide opportunities where the individual's cognitive abilities are kept in good shape, in general.

The connection between health and learning, i.e. the opportunity to contribute to the individual's well-being is another benefit provided by professional development. Participation in learning activities promotes good health by providing social- and cognitive stimulation. It has been claimed that the ability to learn is present even in old age (Andersson & Tøsse, 2013).. Learning via cognitively demanding training and development stimulates cognitive functioning, which can be maintained thought the years, and may even increase with such stimulus (Mehrotra, 2003).[2] Social fellowship has certain positive effects on brain function. However, certain changes in cognitive ability may occur over time. Research has shown that it can be easier for younger people to memorise data, whilst older people perform better in practical learning situations where they can become productive rapidly (Ilmarinen, 1999). It should be noted again that rough categorisations that are based purely on age can only lead to gross simplifications; in concrete situations, one must take several variables into consideration.

From professional development to professional decommissioning

The perspective that professional development is a natural part of one's career should also include a strategy for the decommissioning, or winding down, of a professional position. In today's work-life, at the time of retirement, it is usual for an individual to go 'from a hundred miles an hour to a standstill'. For the individual, such a perspective allows for an alternative to (i) either the person works, or (ii) she doesn't. A more progressive approach to retirement would benefit both the individual and the organisation. Perhaps she can work

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[2] Physical exercise is also important to maintaining one's cognitive abilities, but the one does not exclude the other.

part-time, take on a different role in the organisation, start her own business, or begin a new career in a completely new area.

In such a scenario, a life-long system of study- and career guidance can play an important role in the planning of professional development arrangements and career decisions for older employees who are in search of a place in the work-life which suits them (Cummins, 2014). Such a system can provide opportunities for the employee to ask questions about suitable jobs and learning activities, to consider the pre-requisites that govern alternative work positions, and perhaps decide to continue with the current job, or to discuss whether a reduction in work load or a transfer to another job are viable alternatives for the individual. This demands a broader perspective on professional development because such decisions may entail a new phase in the person's life, where the person can contribute to the work-life under changed conditions.

For the organisation, a transitional, or decommissioning, phase in the employee's career can offer the organisation additional flexibility in cases where the employee works only part-time. If this type of flexibility is to work optimally, then it should be informed by the individual's life conditions, so that the person can combine her work-life with other changes which may occur later in life (Björklund et al., 2017; Bjursell et al., 2014). Another benefit for the organisation with this type of 'softer' transition from work-life to retirement is that it can provide the organisation with the opportunity to collect and safeguard knowledge and skills that are possessed by the employee. For example, the employee might work in a mentor's role during the transition phase, thereby contributing to learning in the organisation. The knowledge and experience possessed by older employees are, when they are dealt with properly and 'upgraded', an asset to the organisation's professional development arrangements, in general.

Professional development via the study circle approach

An increased emphasis on professional development for older employees, together with the danger of the loss of organisational knowledge when these older employees leave the organisation should be cause enough for the organisation to develop learning methods that are attractive to the employee. In one study of how pensioners viewed employment and learning, it was discovered that the study circle approach was the most common way of

participating in education activities. In Figure 10.1, it is shown that in Bjursell et al's (2014) study, 102 respondents out of a total of 232 had taken part in a study circle. Educational formats numbers 2 and 3 in the figure, 'book circle' and 'senior university', were also organised in terms of the study circle approach.

Insert figure here

Figure 10.2 The number of individuals who participated in various forms of educational activities (Bjursell et al., 2014).

The study circle approach is most closely connected to the 'folkbildning' tradition (liberal or popular adult education that does not lead to a degree). In 2012, 36 % of the participants in study circles in Sweden were older than 65 years of age (Andersson et al, 2014). The study circle approach is based on the idea that each individual is involved in his or her own learning via active and equal participation (Andersson & Tøsse, 2013). The study circle approach has a long tradition within the folkbilding movement and is viewed as a democratic and emancipatory arena for adult education (Bjerkaker, 2014). There are different types of study circles, some which resemble a school classroom context, for example, for learning a foreign language (Nordzell, 2011). Notwithstanding this, the emancipatory ambition inherent in this movement is not about 'obtaining knowledge' *per se*, but it is about challenging dominant assumptions about knowledge (Nordvall, 2002). Irrespective of the purpose of organising oneself and others into a study circle, the participants' self-education, so as to increase their knowledge in a particular area, is the main focus of such an arrangement.

Given the popularity of the study circle approach with older people, it may be of interest for us to consider whether this approach has anything to add to an organisation's professional development arrangements. Since the point of departure of a study circle is based on free and voluntary participation, at first glance, it may seem to be tricky to use the study circle approach in an organisation, where the ideal is often such that everyone is expected to 'pull their weight' in the same direction. However, there are several examples of approaches to organisational development which resemble a study circle, including; *research circles*, which have become more usual in educational institutes; *quality*

assurance circles, which have emerged from the context of Japanese production industries and is now found all over the world; and *communities of practice.*

A *research circle* can resemble a study circle where one or more research competency is included (Holmstrand & Härnsten, 2003). A research circle can have different functions during the research process; from supporting the start of the research project, the analysis of the research problem, the collection of data, to the development of popular science (Abrahamsson, 2007). The group as a whole is responsible for the production of knowledge, thus the relationship between the participants is expected to be one of between equals (Holmström, 2009). An important part of this is the mix of scientifically-based knowledge and experiential knowledge. A usual purpose of a research circle is professional development for teachers and lectures at school and university. Four types of research circle can be identified, based on their purpose: (i) to engage in studies based on a specific theme, (ii) to be based on a subject, which is then related to didactics, (iii) to investigate a particular issue, or (iv) to address a particular target group (Persson, 2008). Researching one's own professional practices, so as to contribute to or develop an organisation's operations is an exciting approach which has the potential to be used outside the education sector.

Quality assurance circles were originally used in the Japanese car manufacturing industry as part of their quality assurance work, but are now also used to engage with other development areas (Tang & Buler, 1997; Dahlgaard-Park, 2011). A group of colleagues with similar tasks meet with each other under the leadership of a boss or manager with the purpose of solving any problems in one's own sphere of responsibility. Such operational improvements (i.e. solutions to any existing or anticipated problems), are then shared with the company management, who may approve or not approve what is suggested by the quality circle. However, it is desirable that the employees themselves implement the new solution or operational improvement (if it is approved), since it is believed that this will promote the employees' motivation. Quality assurance circles were most popular during the 1980s, but they still can be found in different forms today. Tand and Bultler (1997) identify seven areas which are necessary for the proper functioning of a quality circle: (i) management support, (ii) the participant's commitment, (iii) good problem-solving abilities, (iv) a low staff turnover amongst the participants (i.e. employee continuity), (v) knowledge of the nature of the task, (vi) support from other people in the organisation, and

(vii) access to information and adequate time to perform the task on hand. Quality assurance circles are primarily focused on operational development, and not an individual's professional development. However, such arrangements remain a source of continual learning.

A *community of practice* constitutes a more theoretical model for collective, experiential learning (Wenger, 1998). Communities of practice focus on informal learning that may take place in a work team or a network. Depending on the time-frame and the researcher, different definitions have been provided for this term; including 'learning between an expert and novice', 'personal development', or 'a tool for management to develop the organisation' (Li et al., 2009). Despite the fact that the theory highlights the informal, experiential, and social aspects of learning, it does occur that communities of practice are used as a management tool to promote knowledge development in an organisation. One area where 'communities of practice' has become a popular tool is in the healthcare industry. A *profession* can form the basis for a community of practice which is involved in solving shared problems (Heery & Noon, 2008). In a community of practice, informal learning that is directed by the persons' interests can take place. Variations of this model include groups who have gathered their attention around a product or theme, so as to develop their knowledge and keep up-to-date in areas which undergo continual change.

The above discussion demonstrates that there is a whole repertoire of different approaches to professional development that are similar to the study circle. An approach based on the study circle in the context of work-life could function as a bridge between practical experience and theoretical learning (Lahn, 2003). An important contribution made by the study circle approach is the emphasis placed on the participants' commitment to, and responsibility for, organising the study circle and maintaining order in the group. This, in combination with solving problems in a particular context, can stimulate development and allow for the transfer of knowledge and experience from older employees to the organisation.

The study circle approach to professional development for older employees

The study circle approach can be of value to an organisation's professional development arrangements. Many older employees prefer the free form of learning, which is based on previous knowledge and experiences and emphasis on one's own responsibility. The following questions may provide some guidance to an organisation which may wish to decide to introduce a study circle approach in the organisation's professional development arrangements:

- Which previous experience do the employees have of professional development? If all previous professional development activities have been passive in nature, then the employees need to be introduced to ways of working with more self-reliant and independent approaches to learning.
- Who is ultimately responsible for the organisation and execution of the professional development arrangements? Study circles are stimulating because of the active participation and the shared responsibility of the participants, but questions remain concerning the support, time, and other resources that will be provided by the organisation.
- Is the study circle approach fit-for-purpose for the particular area, subject, or problem that is to be the focus of investigation? The study circle approach is suitable if the framework is broad in scope with respect to the content of what is to be learnt, its implementation, and the timeframe in which the implementation is to take place. Research, development, and subject knowledge are three areas which are suited to the study circle approach to learning. If, for example, a message from the organisation's management is to be communicated to everyone in the organisation, then a study circle approach to this task would not be the most suitable approach.

Older employees and their context

Life-long education and learning is one way to maintain and increase an individual's knowledge, abilities, and skills. We have now discussed the study circle approach and described it as a suitable educational form which can be used to maintain and build upon the knowledge and experience that individuals have gained earlier in their work-life. This is a popular approach for older employees, but from a planning perspective, other factors

must also be taken into consideration. First, there exist similar arrangements that can be used for organisational development; including research circles, quality assurance circles, and communities of practice. In addition to these, there are several other ways to engage with professional development, both within and without the organisation. An important question to ask is: *When is it suitable to use the study circle approach?*

An overarching principle to consider when one is to choose a particular approach to professional development is to note that an employee is, first and foremost, an *individual*, with a unique combination of characteristics, expectations, and abilities. It is said that we become more different from each other, the older we get (Lahn, 2003). Older employees thus form a heterogeneous group, but they do have one thing in common; their participation in educational activities decreases rapidly with age (Field & Canning, 2014). Golding (2015) reports on the unwillingness of older, poorly educated men to participate in formal educational courses, but also shows that the same men are happy to participate as a group in informal learning contexts. Previous experiences and educational habits influence how an individual engages with future educational programs or courses. Fenwick (2012) investigated older accounting consultants and discovered that a continual process of learning formed the basis of these professional's identity as specialists. The accounting consultants took individual responsibility to keep up-to-date in their field and employed different strategies to develop the degree of expertise which is demanded by the profession. What was missing from their professional development arrangements was a critical examination of the underlying structures and a lack of generalisations concerning knowledge. The most important point raised by Fenwick's study is how it highlights the fact that we need to understand the learning process of older people in relation to an individual-, professional-, and organisational context.

Golding (2015) and Fenwick (2012) both argue that learning must be organised based on the individual's conditions and commitment if such learning is to be successful. When education and learning are working well, this can induce health-promoting effects in addition to increasing the individual's knowledge and skills. From the organisation's perspective, such learning may influence the individual to remain in employment, thereby highlighting the importance of professional development throughout the employee's whole career. This entails that the HR department should adopt a life-cycle perspective so as to increase the effectiveness of its professional development arrangements with respect to the

subject area that is to be dealt with, the individual's characteristics, and age (Lahn, 2003). The HR department has an important role to play in showing how the knowledge that is possessed by older employees can be used to good effect to support the professional development of older employees (Field & Canning, 2014). This is most applicable for individuals who are unused to studying and need organisational support for this. The advantages, and success, with the study circle approach is found in the fact that it places emphasis on the participant's own responsibility to engage in learning and the social dimension of learning as a group. This is something which the HR department can build upon as it formulates its strategies for the professional development of older employees.

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