Human Resource Development and the Older Learner

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ABSTRACT. With an ageing population, one of the key issues in Australia is the learning needs of older people, including older workers. In particular, with looming skills shortages, organisations need to consider ways of engaging older adults in learning, either for transition to new skills or for re-engagement after retirement. This paper explores the learning experience of a group of people over the age of 45 years and examines their learning challenges as they strived to master a complex skill. Using semi-structured interviews, the research explored the learning processes and activities they nominated as critical to their growth. These processes included negative construction, passive learning, modelling, direct guidance by experts, individual practice and experimental learning. The paper concludes with implications for human resource development practices in organisations.

Keywords: Human resource development, older learners, ageing workforce

As the population ages, Australians are likely to remain in the workforce longer and continue to work beyond present retiring ages (Department of Education, Science and Training 2003: 2). Further, the number of young people entering the Australian workforce annually has fallen significantly, and this will escalate (Jones 2004: 34). Therefore, the retention of older workers has become a primary strategy for averting labour and skills shortages.

Whereas previously Australian workers were encouraged to consider early retirement in their mid-fifties, there is now an imperative for them to be encouraged to remain actively involved in the workforce for as long as possible. Workers who are involuntarily made redundant, or who are underemployed, need to be assisted to transitions into new or greater levels of employment. (ANTA 2003: 2)

As suggested by Kearns (2005: 33), one of the key issues in Australia is the necessity to address the learning needs for older people, including older workers. This means that, as the workforce ages and businesses grow to rely more heavily on the skills of mature aged workers, we need to find ways to engage more adults in learning to improve their existing skills and take on new ones (Department of Education, Science and Training, 2003: 9).

The research reported in this paper is an exploration of the learning experiences of ten members of the Woodturners’ Society of Queensland (WSQ) with a view to examining the learning processes and activities they nominated as critical to their growth. The research project was supported by a QUT
community service grant. Our rationale for undertaking this research was threefold. Firstly, as researchers interested in the broad field of adult learning, a study that enabled us to listen to the experiences of a cohort of older learners regarding why and how they learned about the specialised craft of woodturning presented itself as a worthwhile learning opportunity. Secondly, while there is some recent research on the learning processes of older learners, much of this concentrates on learning computer skills (see for example, Gelade, Catts & Gerber, 2003; Reid, Jacobsen & Katz, 2005; Taylor and Rose 2005). Thirdly, when researching older learners there is some difficulty in identifying representative groups who can be a focal point for in-depth interviewing on learning habits and learning strategies.

Using the learning of woodturning as a focus provided a number of research advantages including, the skills are new (to the learner), complex and not easy to learn; the process of producing a completed object has strong similarities to workplace activities; the learner produces a readily identifiable and observable product, so there is no doubt that learning has taken place; the duration of the learning episode can be relatively easily ascertained; and the learner can be asked to reflect on a specific and easily remembered learning experience. Even though the research project took place outside of an organisational setting, these advantages allowed the situation of older learners to be examined more clearly. Finally, while a number of the interviewees were retired, one central theme of redressing the skill shortage is the re-employment and re-training of retirees (DEST 2003). Therefore, the results from this investigation have some affinity to the organisational learning environment.

This paper will briefly review some of the research on the learning process preferred by older learners and then report on the research project that examined the learning processes of the ten older learners who were learning the craft of woodturning. Finally, recommendations will be discussed for organisations on human resource development issues for older learners.
LITERATURE REVIEW

Training of older people clearly has a role to play in ensuring that Australia has an appropriately skilled workforce, and ensuring that workers stay longer in their jobs and remain productive (Anlezark 2004: 5). As Choo (1999) points out, from the employers’ point of view, one of the keys to the retention of older employees lies in implementing age-specific training.

However, there still persist prejudice and negative stereotypes about older learners. Gray and McGregor (2003) identified four common age stereotypes – (a) older workers do not want to learn, (b) older workers cannot learn, (c) older workers have great difficulty learning new technology and (d) an investment in training older workers provides a poor return. Gray and McGregor (2003) go on to refute these negative stereotypes, a stance researched and justified by Bennington and Tharenou (1998) and Patrickson (2003) and Sheen (1999). Murray and Syed (2005) report that, while older workers may be subject to illness and disabilities over time, they have fewer accidents, take less time off for injury, are more attuned to intrinsic work values such as self-expression and autonomy and embody a wealth of knowledge. Moreover, as Crawford (2004) points out, while older adults are not as quick to learn as are younger people, they make up for this through a wealth of experiences that tends to support superior reasoning and judgement abilities, if given time to think and reflect on the learning activity.

Gelade et al (2003) found that the principal hurdle for older learners over 45 was the feeling of anxiety. Crawford (2004) believes that this anxiety focuses specifically on the fear of rejection from their peer group or the instructor. The Department of Education, Science and Training (DEST) reported that many adults do not think of themselves as very good learners and generally lack confidence in their own abilities - some fear or dislike learning as a result of their negative experiences at school, while others avoid learning in the belief that it would be of no benefit to them (2003: 9).

DEST recommended that one of the key action areas for Australia was to understand the needs of adult learners. The report went on to suggest that a start to this understanding was the recognition that:
Adults come to a learning experience with a variety of experiences, attitudes and expectations. Adults prefer to participate voluntarily in the learning experience. Adults learn best if they have a degree of control over their learning environment. Adults want to be able to apply the skill that they are learning to their jobs immediately so they can see a quick and practical ‘return on investment’ (Department of Education, Science and Training, 2003: 14).

They went on to add that making the learning process an ‘informal and social experience’ rather than one based on formal assessment assists many people to overcome their anxiety and that providing a safe, non-threatening environment where the teacher and learner negotiate the learning process is more likely to help mature aged learners stay with the learning program (Department of Education, Science and Training, 2003: 9).

Three recent studies have examined the preferences of older learners in Australia and these are shown in Table 1.

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<th>Table 1: Preferences of older learners</th>
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<td>Limit learning group to older learners</td>
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<td>Include group and collegial learning strategies</td>
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<td>Allocate significant blocks of time Material is organised into small units</td>
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<td>Learner readiness issues are addressed</td>
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<td>Practical knowledge is the focus</td>
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<td>Use self paced methods Use active, discovery based learning methods</td>
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<td>Provide opportunities to practise skills as they are</td>
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<td>Safe, non-threatening, less</td>
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These studies reported that adults over 45 preferred to be in a similar age cohort, favoured collegial learning strategies and had a preference for a slower paced, gradual transfer of learning.

While the studies by Chapell et al(2003), Gelade et al(2003) and Taylor and Rose (2005) highlight some specific techniques, Russell (2005) suggests that the learning journey for older adults moves through a series of stages:

1. The learning often starts with a trigger event. This trigger event may be a disorientating dilemma (Mezirow 2000) or a disjuncture (Brookfield 2000) or may be a series of events.

2. During the initial time of the learning period there may be periods of negative construction, as the older learners entertain self-doubts or compare themselves pessimistically with others learners or even competent practitioners.

3. Balancing the pessimism of the negative construction, the older learners is buoyed by:
   a. Taking a positive view of past successful learning – “I have learnt new things in the past so I can learn new things now’.
   b. The element of excitement of learning something new and experiencing a challenge
   c. A willing openness in admitting ignorance

4. The older learner may experience the ‘swinging pendulum’ of moving between negative construction and confidence

5. The older learner then moves through a process of constructing a positive self image as a learner and competent practitioner.

In summary, then, the literature indicates that common negative stereotypes that the older learner cannot learn are incorrect. The older learner would rather learn among a similar aged cohort, prefers a
gradual transfer of learning, favours collegial learning strategies and may follow a learning path that initially oscillates between negative construction and confidence before settling on a positive self image as a learner.

METHODOLOGY

Participants were recruited by written and/or verbal invitation by the President of the WSQ. Volunteers were then sent a written consent form and an appointment was made for an interview to proceed. Prior to commencing the interviews, the researchers collated a list of possible interview questions and these were discussed, and agreed to, at a meeting with the Management Committee. Semi-structured interviews lasting between one to one and a half hours in duration were conducted to explore a variety of topics relating to participants’ motivation for learning; how learning was experienced; safety issues at the WSQ clubhouse; and the culture of the WSQ.

With permission, all interviews were recorded and transcribed. Consistent with data analysis techniques in qualitative research, themes (or meaning units) were identified within each of the transcripts (Patton 1990). A method of constant comparative analysis following Glaser and Strauss (1967) was used to identify themes and this process continued until further themes were identified and compared with earlier themes. Similar themes were grouped together and those that differed formed new categories (Cavana, Delahaye & Sekaran, 2001).

Ten participants (nine male and one female) constituted the sample for this study. Five participants were over 65 and five participants were between 45 and 64. Eight of the participants were retired, one participant was working full-time, and another was working almost full-time (4 days per week). The participants’ backgrounds varied from trades, to administration, to civil service, to medical work, to retail. All of them had commenced woodturning in the previous three years except for one participant who started in 1993.
FINDINGS

When viewed as a learning environment, one of the benefits of WSQ is that the organisation is a community of practice as defined by Wegner, McDermott and Snyder as:

Groups of people who share a concern, a set of problems or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis.

(Wegner, McDermott and Snyder 2002: 4)

Being a community of practice brings at least two benefits, as far as this study was concerned. Firstly, the learners arrive at the learning episodes highly motivated. This motivation appeared to be intrinsic as evidenced by one quote:

There are some things that you just think “I really want to do this” and the more you think about it and the more you read about it, the more excited you get. Woodturning is like that for me (B)

Another turner referred to the ‘inner demon’:

You see some of the stuff that’s turned out by some of the wood turners …. You realise that you have so much to learn. I suppose there’s that inner demon to a certain extent that starts driving you to say “maybe I should find out a little bit more and try to get my skills a little bit better”. (J)

This intrinsic motivation appeared to be the main driving force for commencing and continuing to learn how to turn wood. There did not seem to be any trigger events, as suggested by Russell (2005), to commence learning, other than reaching retiring age.

But when you retire you’ve got to have some other interests, you know. [For me, it was] mainly because of that mate in [Queensland country town] …. we used to go up there and I was interested from his side of it and then I thought, oh well, a man’s got to do something with his hands and that was basically how I got into it. (F)

The second advantage enjoyed by WSQ was the supportive culture of the organisation.
It’s a good friendly atmosphere… I’ve heard people saying people don’t come here to turn they only come here to talk. But to me that’s very important; that’s part of one of the roles of the society – the camaraderie (I)

I enjoy going over there and the friendliness and being able to go over and have a cup of coffee and a chat and talk about stuff. If you’re trying to do something there on a Tuesday night and [the convenor] is busy, there’s probably six or eight people who you can say “Can you just come over here and show me what I’m doing wrong?” and it’s fantastic. (E)

These comments support the view of DEST that making the learning process an ‘informal and social experience’ and providing a safe, non-threatening environment is more likely to help mature aged learners stay with the learning program (Department of Education, Science and Training, 2003: 9).

The Learning Processes

The participants identified seven learning processes that were important to them. These learning processes were – negative construction, standing back and watching, modelling, guided practice, trial and error/practice, advice/help from peers and structured courses/sessions.

Negative construction

There was some evidence of the oscillation between negative construction and confidence, as suggested by Russell (2005).

I’m not a terribly competent person and I tend to get overawed by those who have natural abilities, I guess, and looking around at others in the class – who had never done woodturning either - and here they were way ahead in the exercises (H).

So I had a go at that and I poked around with this sharp tool that I had and everything went wrong. I thought well woodturning’s not for me and I gave that away really quickly. I blamed myself and thought I’m not good at this sort of thing – I don’t have the time for that. …. I got out of it and I was never going to pick woodturning again. But you sort of keep looking at
things. I’d go up to Montville and have a look around the craft shops and see all this really nice woodturning, so I thought well maybe I can do it. (D)

However, others had no hesitation.

….. I just looked at a book and went for it. I found out that spindle turning was relatively easy, particularly when there was lots of jacaranda around. I got quite excited about the whole thing. On the first day you could turn spindle without worrying too much, cut a piece and there it was. (G)

Generally, though, there was recognition that woodturning was a complex craft and that a significant learning commitment would have to be made.

There’s a whole raft of circumstances you need to understand … turning’s just one of them.

Tools is another. Timber selection… Being able to dry timber or select timber … then your skills in terms of how you convert that piece of timber into an object that’s interesting … there’s an artistic type design aspect to it too. (B)

**Passive learning**

A number of the older learners indicated a preference, in the initial stages of their learning experience, for ‘standing back and watching’.

Then I spent time watching and talking to other guys that were on the lathes doing what they were doing. … The thing was I wasn’t getting in the way too much and I enjoyed it. I did learn a lot. I went down for quite a few weeks before I plunged in and bought the gear. (D)

Probably for the first four Tuesday nights I didn’t do any woodturning. I just didn’t feel comfortable doing it. I probably was worried about my safety and someone else’s with an inexperienced tool in my hand, so probably for the first three or four, I think it was four, I just watched and learned, and pretty much followed [the convenor] around. …. Just followed him around and listened and watched. If someone was doing something on a lathe and he said try
If this way, I wouldn’t speak because I didn’t want to interrupt, but I’d think I probably wouldn’t have been doing it that way but its good I’ve just heard what he said. (E)

This passive form of learning was quite intriguing and, as yet, we have no explicit reason for it. We hypothesise that it may be a product of the anxiety and fear of learning that older learners reportedly experience (Crawford 2004; Department of Education, Science and Training 2003; Gelade et al 2003).

**Modelling**

Closely allied to the ‘stand back and watch’ strategy was the use of modelling. Modelling is an important teaching and learning process whereby an expert performs a task that reveals the various phases and steps necessary for achieving a particular outcome or goal (Billett 2001). All of the participants referred to the importance of being able to observe and learn from the expertise of the convenors / instructors and, in some cases, other members, at the WSQ club. As one participant said, I always learn something, it doesn’t matter [from] who it is… I get a lot out of it, whether it’s a technique or a little gem they throw you. (I)

And a lot of that I picked up from watching the guys over there at the club, just watched them. Or the convenors on the Tuesday, they’re very good, a fantastic mob of blokes. They’ll help you whenever they can. … You can stand there and watch some of those convenors day after day, [named a specific convenor] he’s fantastic as far as I’m concerned, with the guys. That’s my opinion. So (laughs), I’m keeping my eyes out for everything I see and adapting it to suit my mindset. (F)

The main difference between the two strategies – the stand-back-and-watch and modelling – is that with modelling, the learners tended to observe a specific task or skill and would then go home and try the task or skill by themselves. Modelling, of course, has been around for quite some time (Delahaye 2005) and modelling certainly fits the “collective and collegial learning strategies” identified by Chappell et al (2003), Gelade et al (2003) and Taylor and Rose (2005) as important to older learners.
Direct guidance by experts

For the majority of participants, an instructor or convenor played a key role in guiding their initial practice and monitoring their progress. Direct guidance by an expert is part of an ideal workplace curriculum (see Delahaye 2005) and is defined as securing the learner’s access to appropriate resources and demonstrating, modelling, re-modelling and providing feedback. As one interviewee commented:

He tells you what to do, shows you how to do it and then if you’re not doing it, comes and helps you achieve what he has explained … [he] individually helps you achieve what you should have done in the first place. (I)

A number of participants referred to convenors at the club who took them “under their wing” in the early stages and provided a great deal of one-on-one support.

[instructor named] took me under his wing … [He] spent .. time with me and he’s a great man. (D)

[instructor named] pretty much took me under his wing on the second night. He said, ‘come over here and watch this’. He … was turning a terrible piece of wood and he just talked me through everything. I didn’t ask him to do it, he just did it. (E)

Guided practice followed by monitoring was viewed as invaluable since it gave participants the opportunity to practice the skills or activity independently and receive feedback on their performance.

Again, guided practice corresponds well with the “collective and collegial learning strategies” identified by Chappell et al (2003), Gelade et al (2003) and Taylor and Rose (2005) as important to older learners.

Individual Practice

Participants spoke about the importance of practising whether it was at the clubhouse or at home. Participants who owned their own equipment had the advantage of being able to try out new techniques, experiment and turn wood whenever they had the available time.
….. I saw techniques, I’d come home and next time I was on the lathe, I’d perhaps try them. (B)

Well, I initially think, gee that was alright and I’ll grab the idea then watch how they are doing it, then simply bring the idea home and try it myself. (D)

I might get home at quarter to ten on a Tuesday night [after being at a workshop] but I will go straight out there and put a piece of wood in the lathe and go, yep ok I’ve got that set in my mind – now I’ll go and have a shower and go to bed. (E)

A number of textbooks on adult learning (see for example, Billett 2001 and Delahaye 2005) emphasise the importance of practice in the learning process and the role of practice is also highlighted by Chapell et al (2003) and Gelade et al (2003) in their recommendations on learning for older adults.

**Experimental learning**

Several participants emphasised the importance of experimenting in the learning process.

Try again, start over again and try to find out what was the cause that did that thing that happened, and so try to prevent that it doesn’t happen next time. That’s the only way you learn. (C)

If we do this, what will happen and what are the ramifications if you do it in a certain way? So we thought about it for a while …. And I said, yeah, that’d work. ….. but I am still having a go at it to see if I can make it work. ….. I’m trying to work it out in my head first before I try again. I’ve just not been successful. But it’s one of those things to think about. (F).

Participants F and B noted that trying out your own ways to turn wood was an important means of learning. For example, B talked about setting a challenge for yourself and “*seeing if you can do it*” and F referred to the need to watch others, think about ways of adapting and then find your own way. Even though errors may be the result, learning from mistakes was viewed an important experience.
This preference for experimental learning supports the contentions of Chappell et al (2003) and Taylor and Rose (2005) that older adults do take increasing responsibility, prefer self-paced methods and graduate to active, discovery-based learning approaches.

**Advice and help from peers**

In addition to highlighting the vital role played by convenors in facilitating their learning of woodturning, participants referred to their peers as others who provided friendship, support and advice about woodturning. Peers were identified as others who provided valuable knowledge. As A said, “everyone I’ve spoken to is quite willing to share their knowledge” and B noted that, “there’s so much knowledge down there that the … experienced ones have. They’re just oozing it out of their skin, and they’re willing to give it to you”. In contrast to another organisation that provides tuition on woodturning, G commented that “everyone at WSQ will share all their tricks” and that convenors and members alike are generous in passing on information and showing others ways to improve. Moreover, J commented that he has received good ideas from peers and, in turn, he has on occasion provided support to the veterans who attend the Club.

While peers were identified as a positive source of assistance, a couple of participants (C and H) identified examples where their peers hindered their learning. In both cases, the participants referred to peers who gave them advice that was contrary to what they had received from others. They found this to be quite frustrating and confusing. For example, H noted that on occasion, some members looked over his shoulder and told him he was not using the tool correctly, yet he had been informed by others that what he was doing was correct. H noted that his preference was to seek out support or assistance if he felt he needed it rather than being told by a peer to change his practice.

**Structured courses**

The majority of participants (i.e. seven out of ten) claimed that they had attended a structured course on woodturning early in their learning process. The focus of most of these courses was the development of basic skills, including for example, how to sharpen tools, how to turn a bowl, and so
on. The participants undertook such courses as they saw that even the basic skills of woodturning were quite complex.

The approach of the instructor or convenor was an important element to these structured courses. The respondents were particularly appreciative of several qualities in the instructor, including a high level of knowledge, patience, being methodical and making sure the learner understands.

The most useful, I think, would have to be the careful instruction by [instructor named] in the correct way to do things, the slow way, not to rush it – start measuring, planning and all that sort of thing. (G)

One instructor was praised for the way he used a disaster by a learner as a learning point:

Ah, [expletive] yeah. I mean that is one of the best learning processes. When somebody is on a lathe … that is a good opportunity for [instructor named] to fix the individual … and say look what happened guys. (B)

These structured courses conform to the suggestions that the learning for older adults should have sufficient blocks of time with the material organised into small units (Chappel et al 2003), have a gradual transfer of learning (Gelade et al 2003) and be slower paced with a lower intensity of training (Taylor and Rose 2005).

**DISCUSSION AND CONCLUSION**

While this research was undertaken outside the usual organisational context, the advantages of the research site did allow a specific concentration on the preferences of older learners. Further, the results can be examined for implications in organisational settings. As Choo (1999: 72) has commented, once employed, the key to the retention of older employees lies in three areas - implementing age-specific training, by offering flexible employment options and a management which actively encourages, understands and values the presence of older workers. Finally, if older people are to be encouraged to re-join the workforce (see DEST 2003), then the subjects in this research are reasonable representations of those who would be offered training.

The importance of learner motivation and a culture that is overtly supportive of learning was emphasised by its automatic presence, rather than its absence, in this research project. The importance
of motivation and culture is not new, but the findings in this project accentuate the critical nature of learner motivation and a supportive culture to older learners. Organisations will have to ensure that the learners do genuinely have intrinsic motivation to undertake the learning and that the culture of the organisation is both overtly and consistently supporting learning. Unfortunately, in some organisations, such a culture is more ‘espoused theory’ rather than a ‘theory-in-action’ (see Argyris 1999).

When considering human resource development, most organisations immediately activate structured classroom learning. This research has shown that older learners do use structured formal learning quite readily but they do not regard it as a ‘one only’ or as the only option. In addition, a number of the participants in this study only attended formal courses after they had investigated and experienced woodturning for a period of time. Rather, structured formal learning was recognised by the older learners as being, firstly, useful for quite specific learning outcomes and, secondly, as only part of the total learning package. Certainly, older learners see structured, formal learning episodes needing the support of modelling and guided practice after the formal learning has taken place. The modelling and guided practice by a qualified person will need to occur as a regular routine back at the workplace. Further, this regular routine assumes that the organisation supports a workplace curriculum (see Billett 2001) by providing resources such as time for learning and developing supervisors as competent adult learning facilitators.

As further evidence of the need for a viable workplace curriculum (see Billett 2001), the older learners also consistently chose to seek advice and help from their peers and wanted time and privacy to practice. Organisations will, though, need to seriously consider the time spent by the older learner in seeking advice and practising/experimenting as a worthwhile investment.

The learning processes and support mechanisms raised so far in this discussion – intrinsic motivation, a supportive culture, structured learning, modelling and a genuine workplace curriculum - are not particularly new, although a workplace curriculum is a relatively recent concept. However, the older
learners in this research project actively searched for these learning processes and support mechanisms. Organisations will be well served not to assume that their culture and developmental systems are sufficient for older learners. In particular, organisations will have to ensure that there is a seamless link between formal training courses and the workplace curriculum activities of mentoring, guided practice with experts, opportunities for receiving feedback from peers and being given time to experiment.

Three issues do seem to be older-learner-centric. Firstly, a number of older learners will prefer to sit back and watch the skill or task that is to be learnt. Once the older learner has overcome the ‘negative constructions’ of themselves as a learner, they will then move rapidly into an independent learner mode. Secondly, the older learner will engage readily in experimental learning, testing alternatives and extending the skill in a variety of ways, provided this experimental learning can occur in privacy. Thirdly, the older learner may use all of the learning processes raised in this paper, may use processes in a variety of sequences and will be likely to move rapidly between the processes. Unlike youth learners (see, for example, Choy and Delahaye 2003), older learners have the experience and willingness to judge the quality of potential learning experiences and will make firm decisions on what learning they will undertake or not take. Therefore, the development programs for older learners will need to be flexible and self-directed.

References


