Educators? At my (st)age? Older professionals and continuous learning

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Overview

This paper presents empirical research exploring learning practices of professionals categorised as ‘older’ by the literature: 50-plus. Our study was prompted by a growing policy emphasis in Canada on the imagined problem of the ‘older worker’, which is typically framed uncritically as a dual concern around retention of older workers: how to combat ageism in the workplace, and how to retrain older workers. Our funded study conducted interviews and a questionnaire to explore the question: What are the unique approaches and challenges experienced by older professionals in work-related learning? The study focused on certified management accountants in western Canada, who are required to continually ‘update’ their education, who increasingly tend to work past the age of 65, and who, incidentally, engage in a wide range of learning practices. Findings highlight contradictory discourses around ageism, professionalism, and expectations that affect older professionals’ enactment of identities and knowledge in different ways. The discussion raises critical questions about traditional conceptions of the ‘educator’ who undertakes some planned intervention in professionals’ learning. In particular, it examines issues posed by older professionals to reconsider what counts as an educator, and to critically examine the logic determining that educators are entitled to insert themselves into (older) professionals’ learning.

The problem of the ‘older worker’ as learner

The ‘older worker’ category has appeared in recent policy documents in the UK, Europe and North America with varying age-dependent definitions, usually 50+ years (Europe – ESRC, 2007) or 55+ (Canada – HRSDC, 2000). Older workers’ job satisfaction and retention in the paid labour force has become a policy priority because of two main projections: the projected shortfall in the availability of skilled labour now and in Canada’s future, and the ‘greying population’ such that 30% of the North American population will be over 55 years by 2025 (HRSDC, 2004). Changes to regulations around mandatory retirement are also expected to wreak changes in workplace demographics, although these effects are not yet clear. In fact, in fall 2006 HRSDC announced a major targeted initiative for older workers to help retain or re-integrate older workers into the workforce through training and other supports.

This is the economic logic, that learning is important for retaining and improving the productivity of older workers as human resources. For us, however, understanding older workers’ learning is important because this category has become mobilised in a new generational politics being represented in workplaces. Age references have until recently virtually disappeared from discussions of social relations at work. With this growing policy and research focus, the ‘older worker’ has become singled out for recognition, then constructed as a particular subjectivity in isolation from the generational dynamics of the workplace. Other age categories are not typically considered in these policy discussions alongside the so-called seniors, nor are the relations within and among these categories
addressed. The problem then is that markers of ‘older worker’ are particularly prone to stereotype and essentialism. There is a lack of discussion about what constitutes ‘age’ in terms most relevant to the workplace. Is it purely biological and chronological? Health-related? Determined through generational experience, as when human resource developers talk about the ‘boomers’, the ‘traditionalists’, and the ‘milennials’? Or is age a code for occupational experience and career stage? For instance, workers who switch careers or join a profession in mid-life – such as many professors of adult education – can find themselves referred to as ‘young people’ at the age of 45.

Problematically in this whole construction, the older worker becomes an odd floating category among communities of workers that for the most part are considered in ageless terms. The emergence of the category and the work that continues to maintain its boundaries becomes submerged in the press to trace its causal trajectories. Onto such a category can be projected all kinds of effects and issues that frame problems unhinged from the cultural-historical dynamics of the workplace. For these reasons, any study of older workers must be particularly careful to consider the web of relations and the multiple dynamics and constructions of age as only one social characteristic functioning within this web. The category itself must continue to be problematised and re-located within other age categories. And of course, inasmuch as social characteristics function in social networks of power to produce inequity, age must be considered in conjunction with gender, race, sexuality, dis/ability and other dynamics of identity and social location.

Notwithstanding these considerations, the existing literature on older workers has characterised their learning and knowledge as particularly important in the knowledge economy discourse, where emphasis has been placed on fast-changing technological and innovative learning, as well as entrepreneurism and resilience (OECD, 1996). Older workers reportedly face devaluing of their knowledge, age discrimination in a youth-focused workplace, physical difficulties, and consequent exclusion from learning opportunities, as evidenced in the literature (Betcherman, Leckie and McMullin, 1997; Morrison, 1996; Tindale, 1991). Age-related discrimination has generated misunderstandings, negative stereotypes and ultimately, devaluing of aging workers by colleagues and employers, constructing them as ‘problems’ taking up jobs and resources (Ainsworth, 2006; Carroll, 2007). While age is reportedly more acceptable in some professions such as law than in others such as the high tech industry, Ainsworth (2006) shows that in general the traits of reliability, personal maturity, stability and punctuality assumed to characterise older workers are not valued as much as the mercurial, flexible dynamism that is assumed in younger workers. In our own media we see images urging aging workers to re-construct themselves to fit the norms of youth: dying their hair, carrying a blackberry, even having cosmetic surgery. This effectively forces older workers into a particular kind of learning that undermines their own identities, work history and knowledge. Cultural demographers assert that this group shares distinct generational values, social practices, attitudes to work and learning, and life experiences (McMullin, 2004), although this presumption is contested and awaits empirical examination in different work communities.

**CMA profession and learning**

We chose to focus on professional certified management accountants (CMAs) because this group is characterised by a particularly large proportion of older individuals, who often continue working well past 65 years (e.g. as private contractors), and whose work is embedded in fast-changing regulations, workplace structures and technologies that are supposed to necessitate continual learning. As is the case with other professions, accountants are challenged by intensified work, increasing demands for specialization,
new emphasis on entrepreneurial flexibility, and increased performance regulation. Growing public demand for scrutiny of accounting practices and the general rise of an audit culture likely contribute to CMA associations’ recent requirement that accountants demonstrate their competency and ongoing professional development annually:

CMAs hold positions of utmost trust in organizations and, as such, owe a professional standard of care to employers, clients, fellow members and the public at large. By formalizing our commitment to the principles of ongoing professional development, CMA Alberta members uphold the trust of all stakeholders, further solidifying our reputation as the designation of choice amongst strategic financial management professionals. Competence and Proficiency are an important component of the CMA Alberta Code of Ethics. (CMA Alberta Code of Ethics and Rules and Guidelines of Professional Conduct, Section 4.0 Article I)

Indeed, continuous learning has become a key emphasis for professional associations serving CMAs in Canada. Members must retain a log and evidential documentation of these activities, and submit to the association an ‘annual declaration’ indicating compliance with the policy along with their annual membership fee. The Association may ‘audit’ a member at any time to check the logs of specific activity participation. In choosing activities that the Association deems relevant to professional learning, CMAs are encouraged to use the CMA Competency Map as a guide. This map presents six ‘functional’ competencies for the professional CMA (strategic management, risk management and governance, performance management, performance measurement, financial resource management, and financial reporting) and four ‘enabling’ competencies (problem solving and decision making, leadership and group dynamics, professionalism and ethical behavior, and communication). These competencies are treated as essential and universal regardless of a professional’s experience or context of practice. Amidst all of these dynamics, discourses of ‘trust’, ‘professional development’ and ‘standard of care’ emerge as dominant, and embed multiple and conflicting meanings within an overarching mode of control and discipline.

Professionals’ learning within the CMA professional development literature and approach is construed as individualist, acquisitional and measurable. Our own approach to understanding professional learning is rooted in perspectives of learning as practice-based and embedded in everyday action (Billett, 2001; Bratton et al., 2003). We view learning as tied to people’s work identities and sense of self and meaning in their work, which change over the career course (Chappell et al., 2003). It is social and interactive. The history of a professional group such as their educational experiences and the knowledge structures of their discipline also shape the ways they learn and how they value learning, or not. The cultural norms, accepted practices, relationships and everyday objects/technologies of a particular professional community of practice or industry shape what is considered useful knowledge, e.g. what is normatively considered ‘good’ to learn, and what processes are recognised to be evidence of learning by different actors in the community (Engeström, 2001; Sawchuk, 2003; Wenger, 1998).

**Study methods**

This project was intended as a pilot study to explore whether the dynamic of ‘age’ and its various meanings played a significant role in professionals’ learning and conditions of practice, and whether management accounting would be a useful site for further study of learning practices in situ. The present study so far has combined survey and interview methods, and is partially complete. Working with the CMA association we developed a survey for all practicing CMA professionals (all ages) to examine their perceptions,
practices and challenges related to learning, and to explore their perceptions about ‘older’ CMAs’ learning practices and challenges. We sent email invitations to all registered CMAs in Alberta (5487) to participate in this web-based survey: a total of 816 responded, which we felt was unusually high given typical response rates for such surveys and the time of year. Of these, 34% identified themselves to be 50+ years of age. From the submitted surveys, we received over one hundred requests for a personal interview, which was surprising to both ourselves and the professional association. After survey data was analysed we conducted personal in-depth interviews with 60 self-nominated ‘older’ CMAs (50+ years). Questions explored their changing conditions and relations at work in their particular organizational environments, their changing knowledge and learning practices, and their perceptions about whether age played a role in these dynamics. We are now in midst of transcript analysis, and later in the year plan to conduct focus groups to further explore and expand the findings.

Findings and discussion

In our findings to date we discovered that older CMA professionals indeed report some devaluing of their knowledge, some age discrimination in a youth-focused workplace, some physical difficulties, and declining interest in learning opportunities of a particular form. It appears that this group does share certain distinct generational values, social practices, attitudes to work and learning, and life experiences. On the whole these ‘older’ workers tend to desire to continue meaningful work, but some face systemic barriers that younger employees do not encounter. These barriers can include (1) certain skills no longer in demand, and a perception of lacking relevant skills for some growth industries and sectors of the economy; (2) a lack of recognition for their years of experience and expertise; (3) less willingness to be geographically and/or occupationally mobile for an employment opportunity, for reasons of cost and risk; (4) some negative stereotyping by employers, the media, and colleagues about their capacity; (5) some social and managerial pressures on these professionals to step aside to make way for younger workers, reduce payroll costs and downsize organizations; (6) professional development programmes viewed by some as inaccessible and/or inappropriate to the needs and interests of older professionals; and (7) a sense of having more to teach others than to learn. Learning practices most valued tended to be experience-based, rooted in solving non-routine problems or leading new initiatives. Many described a sense of rejuvenation around their work, a desire to continue but to exercise greater independence and control over their work. However, several noted tensions around the generational jostling in their workplace particularly concerning what forms of knowledge are valued most, and who is granted epistemic authority in collective work activity. Reward structures, work assignments, and identity positions were all areas where age played out as a marker of power in the workplace relations. This forces older workers into a particular kind of learning that undermines their own identities, work history and knowledge.

In effect, these older professionals receive double messages related to their age. On one hand they encounter discourses in their discussions with clients and supervisors reiterating the value of their ‘experience’ and maturity; on the other, they are sometimes treated as sunset watchers, waiting for retirement amidst subtle encouragements to make way for younger professionals. The biologised discourse of decline is not explicit in their interactions with colleagues and clients, but may hover in nuanced references to their energy and capacity for particular activities. Their work experience is rhetorically valued but in practice, they may be questioned in terms of their reliability: how ‘up-to-date’ they are on procedures, technology or management approaches. Problem-solving, both related to accounting and to human relations in organizations, is a major part of their work and an area of practical embodied knowledge in which some take personal pride. This knowledge
may or may not be valued, sometimes classified as ‘traditional’, ‘old school’ or even ‘rigid’. Mentorship is a role they may be assumed to want to engage in organizations.

Continuous learning of the sort promoted through the CMA professional association was described as uninteresting or inappropriate for their career stage by 32% of the 50+ CMA survey respondents while 42% of the same age category replied that no need for further competence development was necessary. Those we interviewed indicated that continuing education tends to focus upon straightforward competency development in areas that they viewed as routine. Further, their interest in the nuanced complexities of cases and organizational dynamics such as micro-politics and conflicting stakeholder interests were rarely addressed in CPD. Typical delivery methods (mini-lectures, problem cases discussed in small groups then debriefed, or text-based modules presenting problems of practice and questions) were sometimes viewed as banal or tedious, teaching the obvious. Some interviewees noted that continuing education sessions and materials made little effort to distinguish among participants’ different industry-specific needs and experiences, their knowledge, and their interests. Some felt their own knowledge was under-recognised in PD offerings. Most believed that their CMA-related knowledge interests as older professionals were much different to those of their younger colleagues.

For their own learning, many typically turned to books and journals (50.4% of the 50+ survey respondents) as well as valuing their everyday challenges as complex learning opportunities. In fact, the knowledge areas in which interviewees indicated primary interest included concerns about the changing nature of the CMA profession, the effects of the political economy on CMA practice, new challenges of accounting practices across transnational and global contexts, and issues of ethics in relation to accounting practice. However, their personal pursuit of these issues in books and news was often constructed as separate to what the CMA association recognized as PD. The ‘educator’ in their professional learning was, to most, assumed to be the appointed facilitators of planned continuing education events. While many distanced themselves from engaging such events, they were compelled like all CMAs to maintain licensure by submitting declarations of their continuous learning in terms of its specific links to the competency areas. This exercise was identified by many as a necessary if rather irritating requirement. But it did position them as subject to the disciplining gaze of the educator as assessor of professional learning. In the final analysis, the educator in both these iterations is constructed as controlling and regulating particular forms of knowledge and particular processes of learning to define what it means to practice management accounting. Older professionals appear to view these knowledges and learning processes as at best irrelevant to their own specific practice contexts and activities, and at worst as naïve and limiting.

Many themes here are salient to the emerging research focus on the so-called ‘older worker’. But to focus on the present issue of continuing professional development and the role of the educator, the findings here demonstrate certain problematic assumptions underlying educators’ interventions in professional learning. In adult/continuing education literature there arguably persists a redemptive desire, premised upon a belief that professional ‘learning’ without the enlightened guidance of the educator may simply reproduce dominant undesirable patterns (declining collectivism, erosion of professional autonomy, social inequities, injustice and oppression, and so on). Upon this logic is premised the educator’s claim to legitimate insertion into contexts of practice: reconstructing the complex interplays comprising these contexts as pedagogical sites; recontextualising the knowledge therein in pedagogical terms that may be reductionist; and imposing universalised measures of competence and requirements for ‘learning’ upon
the practice. Older professionals are perhaps not unique among their colleagues in resisting some of these educational impositions for the very reasons that they find them inadequate in addressing the nuances and layers of dilemmas in their everyday practice. We also have preliminary evidence that older professionals prefer to frame their own learning in everyday practice, and many educate themselves in the broader domain of public pedagogies where they often select texts, travel, and encounters that allow them to explore broader contexts, issues, politics and futures related to their practice.

In fact, adult educators concerned about the turn to ‘learning’ might actually approve the content and purposes that we discovered among the learning of older professionals. But educators’ approval is really beside the point. Educators are motivated by many different and contested purposes reflecting different visions of social order. The moral argument about whether this or that purpose is more defensible or more universally ‘good’ is ultimately irresolvable. The point is that whenever an educator intervenes in human activity to construct it as ‘learning’, the attempt is fundamentally to discipline human beings according to the educator’s view of the ideal human subject. In the case of older professionals within the continuing PD contexts of CMA practice reviewed here, the educators’ attempt at such discipline is often unsuccessful. Educators could assume various implications from this: (1) that more ‘age-appropriate’ technologies of pedagogy need to be deployed; (2) that overly strict correspondence of PD with a skill-specific technical competency framework is to blame, and that other views of knowledge and educational purposes (emancipatory, feminist, cultural-historical, emergentist etc) would be preferable; or (3) that the presence of an educator regardless of educational purpose in older professionals’ activity pedagogises professionalism in ways that may close possibilities rather than opening them.

References


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