



## Engendering Learning and Guidance in Later Life: An empirical study

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### Abstract

Scotland's workforce is ageing, resulting in a greater number of adults aged 50 and over in employment or seeking employment than ever before. This presents significant challenges, particularly for older workers remaining in the workplace, with barriers such as employer attitudes and legislation often forcing individuals to re-consider their point of exit from the labour market. Financial circumstances dictate that, for many, early retirement may not be an option.

The *Realising Your Potential* project encouraged older adults to re-engage with lifelong learning to help enhance employability in later life. It was designed, tested and evaluated by the University of Strathclyde's Centre for Lifelong Learning. The project methodology was framed around double-loop learning theory and supported individuals through a series of stages to reflect on past experiences, build confidence and motivation for future planning and learning and encourage goal setting to achieve future aspirations.

Project findings suggest participation in lifelong learning activity varies significantly depending on background and initial educational experiences. Coping with uncertainty and managing change are also key factors affecting older workers in the current economic climate, with issues such as job security, changing career trajectory and working beyond statutory retirement age areas of concern. In addition, access to appropriate advice and guidance in Scotland for older adults would appear to be a concern with project findings attempting to influence policy on information, advice and guidance to ensure Scotland's national 'all-age guidance' service takes into account the capacities, needs and aspirations of older adults.



## Introduction

*“Learning n. knowledge gained by studying.”*

*“Guidance n. 1. Leadership, instruction or direction. 2. Counselling or advice on educational, vocational or psychological matters.”*

(Collins English Dictionary)

Learning and guidance, whilst distinctly different, are intrinsically linked. It is important, however, to recognise the distinctness of each, as often the true meanings of learning and guidance can be misrepresented or assumed only to be relevant to specific segments of society such as young people. Learning takes place in a variety of ways and through a number of mediums. It can be done formally at school, College or University; it can take place informally, at work or within the community; and it can be delivered in the classroom, at home or via computers. Learning is ubiquitous and the emergence of lifelong learning as a vital European educational strategy has grown over the last decade. As Schuller and Watson (2009) point out, a genuine lifelong view of learning should be used as the basis for a *“coherent systematic approach to lifelong learning”* (Schuller and Watson, 2009: 1) and to achieve this, consideration must be given across 4 age stages – up to age 25, 25 to 50, 50 to 75 and 75+.

Guidance, on the other hand, is often associated with career guidance, where public funding is directed towards specialist organisations to provide advice and guidance to individuals who need it. The OECD (2004) note that traditionally, *“career guidance has mainly been provided in schools and in public employment services”* (OECD, 2004: 24). It generally assists young people in making key decisions such as which occupation to pursue or which course of tertiary education to embark on. It can also have a focus on assisting unemployed individuals with job decisions. While there is no question that it is an invaluable service for this particular generational group, there is a growing segment of the population between the age of 50 and 67 who are increasingly in need of guidance for a wide range of life transition, learning and employability related reasons.



This paper briefly examines the challenges of an ageing Europe before presenting a case study field tested in Scotland by the University of Strathclyde's Centre for Lifelong Learning. The action research project, *'Realising Your Potential'* was a 3-year ESF funded project using reflective and peer-supported learning to encourage older workers to re-connect with learning, update existing skills and develop new skills with a view to enhancing employability in later life. A particular focus of this paper is the learning and guidance issues faced by older adults, with findings elicited and presented.

### **The challenge of an ageing population**

One of Europe's greatest challenges is its ageing population. With many Member States implementing policies and reforms that encourage older adults to work longer in later life, the employment rate of older adults aged 50+ is expected to increase significantly over the next decade. Action and interventions are required to support older adults update their skills and knowledge, and to help them re-engage with learning and enhance their employability to ensure both economic and personal needs are met. *"Taking no action would weaken the EU's ability to meet the future needs of an ageing population"* (European Commission, 2009: 3).

This challenge has led to governments and policy makers across Europe introducing measures, such as increasing statutory pension age, that encourage older workers to remain working longer in later in life. Paradoxically, many organisations, particularly in a time of economic recession, adopt strategies which adversely affect older workers, for example, through early retirement/redundancy programmes. The true value of the older worker, the tacit knowledge and hidden skills which often exist can be lost to the labour market. Moreover, older adults who exit the labour market at 50+ are less likely to re-enter employment than their younger counterparts (TAEN, 2009). To ensure growth and economic prosperity in the future, employer attitudes and views of older workers must change. For this to be achieved, assistance must be provided to help individuals understand the wider implications of exiting the labour market and planning for life beyond work.



## Striking a balance

Many young people across Europe today continue to leave school with low or no qualifications and will no doubt face significant labour market challenges in the future. Rightly so, this is a key priority being addressed by the European Commission. However, older adults, too, face serious challenges, with many in low-skilled, low-paid employment or facing redundancy, both of which may lead to greater levels of pensioner poverty. Furthermore, the *“future European labour market will be simultaneously confronted with an ageing population and shrinking cohorts of young people. As a result, adults - and in particular, older workers - will increasingly be called upon to update and broaden their skills and competences”* (The Bruges Communiqué, 2010).

Today’s generation of 50 to 67 year olds, too, are less likely to have benefited from Further or Higher education on leaving secondary education back in the 1950/60’s. In Scotland, 57.5% of school leavers went onto Higher or Further education in 2009. This compares with less than 15% of school leavers in the early 1960’s (Scottish Government, 2010), a pattern which is almost certainly reflected across Europe. Data also show that instances of adult education and participation in learning declines with age (Schuller and Watson, 2009), a point supported by the European Foundation for the Improvement of Living and Working Conditions (2008) who contend that older workers across Europe receive less training and development than younger people and that lifelong learning has been detected as an important factor for extending the working life. Bohlinger and van Loo (2010), citing the work of Shultz *et al* (1998) drill down further and examine the interconnectivity between factors that affect participation in learning later on in life and labour market participation. They argue that, in order to understand the extent to which older adults wish to participate in learning, the relationships between age, learning and work capacities must be examined.

In order for individuals, regardless of educational background and experience, to participate fully in lifelong learning activity, the ‘*Funnel*’ phenomenon (Smith, 2010) has to be addressed (figure 1). Education in Scotland, as in most developed countries, begins at an early age with many children benefiting from pre-schooling before progressing onto primary and secondary

education. At this stage though, a drop in participation levels can be observed with individuals exiting the learning system altogether. This narrows further with age, although a proportion of learning may take place through continuous professional development activity. For those who are unemployed engagement in learning is even less likely. On reaching age 45+, participation rates in learning drop significantly, particularly among those who are in low skilled, low paid jobs or who are unemployed.

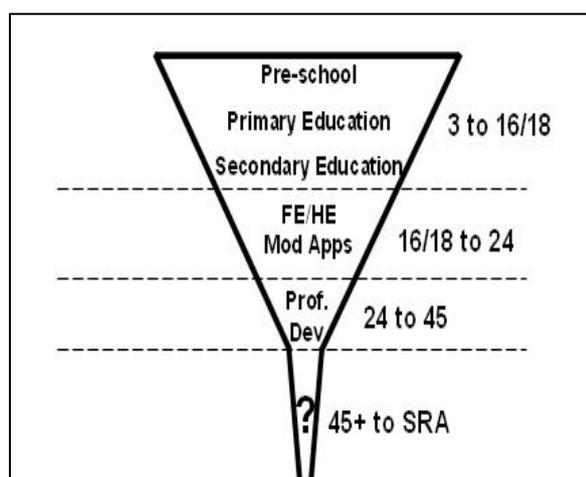


Figure 1: 'Funnel' theory of participation (Smith, 2010)

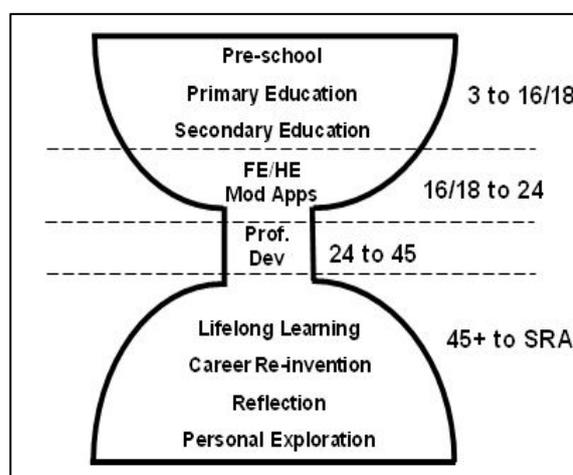


Figure 2: 'Hourglass' theory of participation (Smith, 2010)

In contrast, Smith (2010) suggests a more participative and inclusive approach, one that engenders a culture of continuous learning throughout the life-course. The *'Hourglass'* theory of participation (figure 2), while acknowledging the need for a robust and challenging educational system in the early years, argues that it is equally important to open up opportunities in later life to pursue interests, enhance employability prospects and explore potential. Through reflection and personal exploration, opportunities for re-entering the labour market or embarking on a career change in later life can be enhanced. There is also an opportunity for providing a sense of direction for those who may be considering, or are already in, retirement. In essence, this model concurs with Barham and Hawthorn's (2010) analysis of the support required for older adults to make informed career decisions. They conclude that quality careers guidance is equally important for the older part of the population as it is for those starting off in working life.



## Realising the potential of older workers

Using this as a foundation, the Centre for Lifelong Learning created the *Realising Your Potential* project, framed around Argyris and Schön's (1978) 'double loop' learning methodology. The project aimed to engage older workers in a bespoke programme consisting of five stages (figure 3), with the hypothesis that by going through the programme, individuals would be better informed and motivated to progress onto new learning opportunities.

**Stage 1** encouraged individual's, through semi-structured interviews, to reflect on past learning experiences and identify barriers which may have existed thus preventing participation in learning earlier on in life.

**Stage 2** offered a bespoke Learning Programme delivered over a set period of time and covered areas of relevance to individuals who have been disengaged from learning for a period of time.

**Stage 3** encouraged individuals to explore areas of interest, understanding that they may have always wanted to learn something new, but never had the time, opportunity or encouragement to do so.

**Stage 4** allowed the opportunity to evaluate current work ability and future work potential. Using a self-administered questionnaire, individuals identified and assessed key barriers that may have affected their capacity to continue in the labour market in the future.

**Stage 5** encouraged reflection on the programme and supported progression onto new learning opportunities through a structured seminar programme.

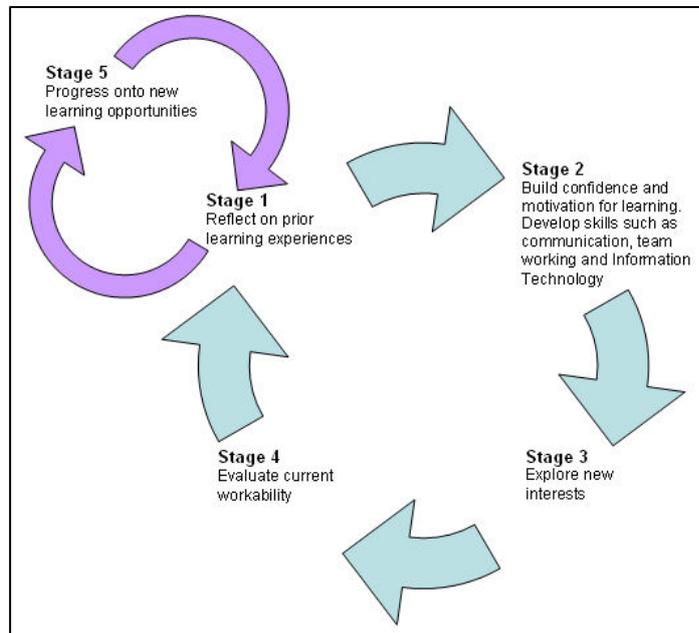


Figure 3: Realising Your Potential Learning Model adapted from Argyris and Schön (1978)

## Findings

Ten groups totalling 134 older workers, from a wide range of backgrounds and industry sectors participated and benefited from the programme. In terms of gender, the split between men and women was contrary to Schuller and Watson’s (2009) findings that participation in learning is more or less equal above the age of 50 for both men and women. In this instance women were more participative in learning than men with 75% of participant’s female and 25% male. With the exception of one participant, all were white from the UK/Other and three participants were aged 65+. All other participants were aged 50 to 65.

Of the total number of participants, 63% worked in the public sector with 34% coming from the private sector. 3% worked in the voluntary sector. Of those who came from the private sector, 44% were self-employed.

### *Learning and Qualifications*

When initially scoping out the project, prior to the global recession and financial crisis, the contention was that the project may lend itself more to individuals who fell into the category

of low-skilled and low-paid. Findings suggest that this is unfounded, as 64% of participants were qualified to level 4 and above of the International Standard Classification of Education (ISCED). 19% of participants could be considered to fall into the low skill category (Level 2 and below), and even then, many held positions that, today, would demand a Degree or equivalent. These individuals acquired the necessary work skills through extensive experience. It should be acknowledged, however, that while a high percentage of participants were well qualified, future project activity may have to review the recruitment process to ensure those who are less skilled, and may have less confidence in participating in this type of programme, have the opportunity to do so.

At Stage 1 of the project, data were captured on learning history and preferred modes of learning. In terms of involvement in any formal learning, it had been more than ten years for 64% of participants with only 11% participating in formal learning over the previous two years. This changed significantly when asked how long it had been since participating in informal learning. 79% were actively engaged in learning or had been within the past two years compared with 11% who had not participated in informal learning for over ten years. Table 1 below shows this in more detail.

**Table 1: Participation rates of individuals in formal and informal learning over time**

Time-scale	< 2 years	2 – 5 years	5 – 10 years	10+ years
<b>Formal</b>	11%	10%	15%	64%
<b>Informal</b>	79%	7%	3%	11%

A review of preferred learning styles also took place. All participants had experience of classroom based learning with only 42% having experienced on-line learning, with the overwhelming response being it is not their preferred way of learning. Only 25% of participants had experienced distance learning with 35% having experienced workplace learning.



Individuals were also asked to consider the type of learning that would interest them most at this stage in their working lives. 60% indicated that career related learning would be of interest and 81% responded that they would also like to learn for their own personal interest. Only 10% were interested in achieving any type of formal or vocational qualifications.

### ***Advice and Guidance***

In 2008, the Scottish Government created Skills Development Scotland, a non-departmental public body which brought together the careers, skills, training and funding services of Careers Scotland, Scottish University for Industry (Learndirect Scotland) and the Skills Intervention arms of Scottish Enterprise and Highlands and Islands Enterprise. The organisation has 1,400 staff and a network of public access centres and offices across Scotland. It is an all-age guidance service open to everyone regardless of age. Individuals were asked if they knew of this service and 78% responded that they had not. Once the background to the service had been explained, 80% indicated that they were unlikely to, or unsure of whether to, access the services offered. The main reason given for this was that the service was more tailored to, and appropriate for, younger people.

The seminar programme proved reasonably successful in linking individuals with areas of interest that may be of value in the future. However, only 44% of participants attended at least one of the thirteen seminars that took place, with some attending more than one. This perhaps highlights that work is still required on finding a successful bridging solution between what the programme has to offer and what individuals wanted to move onto despite the content of seminars being driven by participants themselves.

### ***Uncertainty***

Many older adults experience significant barriers that affect participation in learning and these become more amplified with age. In addition to issues such as time, cost, perception of relevance and ability, one of the key issues identified is managing and coping with change in later life. This would appear to be exacerbated by the current economic situation with many facing increasing uncertainty around their employment situation.



One of the most significant findings relates to the level of uncertainty many individuals face when considering the point at which they retire, and the likelihood of working beyond statutory retirement age. 61% of participants stated that they are likely or extremely likely to work beyond retirement age, which in the UK is currently 65 for men and 60 for women. A further 30% were not sure whether they will work beyond this point with only 9% unlikely to.

### **Theory/Practice Dyad**

A key area of this project was the links between theory and how findings materialised in the 'real world'. The body of literature and research around employability and guidance in later life has only started to come to the fore over the last decade. Donald Hirsch (2000), one of the early commentators in the field noted *"the transition from work to retirement has only recently started to become the focus of attention for academics, policy analysts and social commentators."* (Hirsch, 2000: p2). Although there has been more attention paid to the subject recently, the breadth of literature focussed on the UK, in comparison with other fields of study, is comparatively narrow. This reduces further when examining the topic in a Scottish context. Furthermore, a large proportion of the literature has been carried out for policy purposes as the ageing population has wider societal implications for government.

This provided a challenge when creating the project as the literature to build on, particularly in Scotland was limited. The Centre for Lifelong Learning is the leading expert in age and employment in Scotland and through the expertise and experience of staff working in the Centre, the project was designed and tested by them. A further influencing factor in the project design was the funding strand, which was practitioner rather than research based meaning set targets and outcomes were to be achieved. This restricted academic freedom in terms of designing a research question and hypothesis testing as time restraints and resources limited the opportunity to adopt this approach.

The method adopted in this project was therefore not a classical research one, but more driven and designed through the lens of a practitioner. This offered the opportunity for the project findings to be written up from a researcher's point of view at the end of the project life-cycle, with a number of key issues and areas for further research emerging.



## Conclusion

Population ageing across Europe brings fresh challenges for both individuals and policy makers. The current generation of older adults are living longer and healthier lives than previous generations and have a different outlook on work and retirement. As has been demonstrated through this project, there is an increasing likeliness of older adults working longer, with different aspirations and ideas on how they wish to live and work in later life.

With policy increasingly being steered towards increasing employability rates of older adults, it is important to consider the value of continuing to learn and develop in later life and to continue adding to the vast amounts of knowledge and experience that often has been amassed throughout working lives. This requires a clear strategy among policy makers to engender a culture of guidance for all, services that not only serve the needs and ambitions of younger people, but one which older adults feel comfortable and confident in accessing.

Guidance and learning are inter-twined. The provision of appropriate guidance can help highlight the learning opportunities which exist and, further, can help instil confidence among those who need it allowing them to access and embrace the true ethos of lifelong learning and continue to contribute to society in later life.



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