

# **Informal Learning and the Older Professional Worker: Learning Practices, Challenges and Supports**

**by**

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## **Executive Summary**

### Objectives

Older workers' (aged 50-64) job retention in the paid labour force has come to the fore because of the shortfall in availability of skilled labour now and in Canada's future and the projection of a 'greying population.' Employing mixed methods, the research focused on the unique approaches and challenges experienced by older professionals in informal learning, the everyday experiences in which people learn. In addition, the research focused on the practices of documenting (methods for keeping track of learning), assessing (making judgements about learning), and supporting (methods that facilitate learning) that are helpful for older workers' informal learning practices. The project focused on Certified Management Accountants (CMAs), knowledge workers whose continuous learning is urgent in Canada's 'hot economy' and whose professional associations have made learning a priority.

The purposes of the study were to examine the informal learning practices of older professional workers, and to explore ways to document, evaluate and support informal learning practices. The research questions were: What are the unique approaches and challenges experienced by older professionals in informal learning? What practices of documenting, assessing and supporting their informal learning are helpful for older professionals?

### Study Design

The study was a qualitative inquiry employing mixed methods, which enables the researchers to gain an in-depth analysis of the informal learning processes (Denzin & Lincoln, 2000). Mixed methods enable a breadth as well as depth of data analysis. Research methods included focus groups, an electronic survey and in-depth personal interviews.

An electronic survey was designed and distributed to 5487 CMAs in Alberta with 816 participants completing the survey (a list of the questions is provided in Appendix A). The survey was developed in consultation with CMA Alberta, the provincial professional association responsible for ensuring the professional development and continuous learning of CMAs. The survey was designed to address questions the professional association had about the learning of older CMAs, a group not well represented at professional development gatherings organized by

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the association. The survey was designed to obtain a broad baseline of (1) individual perceptions and values with respect to their informal work learning, (2) individual informal learning practices and motives, and their methods for tracking and assessing these, and (3) challenges, opportunities and resources that support their informal learning practices. The purpose of the survey was to assist the professional association in understanding ways that it could support the learning of its older professionals.

Descriptive analysis of the electronic survey was conducted. Emphasis was placed on identifying general patterns and issues related to informal learning practices of the 50-64 year-old group.

Telephone interviews were conducted with 60 CMA professionals who identified as 50+. The interview questions (Appendix C) were developed to enable clarification on issues raised in the survey, and to develop a deeper understanding of workplace factors that influence informal learning. In addition, the questions were designed to build on existing knowledge found in the literature about informal workplace learning to identify age-related and generational dimensions of learning that may exist. One semi-structured personal interview with each participant about 60 minutes in duration was conducted, to explore the individual's meanings, practices, values and motives in informal work learning, how these have changed over time, particular challenges or opportunities in informal learning that one experiences as an older worker, and desired supports for informal learning. The interviews were digitally recorded and fully transcribed. Interpretive content analysis of transcripts, researcher journals and audiotapes proceeded from multiple readings/listenings to discern key patterns within each participant's unique informal learning experience. Thematic findings from the different participants were then analysed comparatively. Survey data analysis and results were compared to and integrated with the qualitative interview analysis.

### Outcomes

CMA workers' learning is closely tied to their satisfaction, identities and meaning in work, and evidence suggests that older workers often feel excluded from learning opportunities, and their learning undervalued. One reason for addressing this issue is the current federal focus on retaining and re-integrating older workers into the labour force, and another is to better

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understand and support their lifelong learning in work. Two main themes emerge from the interview and survey data: career context of older CMA workers and the practices and issues related to the learning of older CMA workers. Within the first theme, career context, the way CMA professionals engage in learning, and *what* they are learning, is determined within the contexts of their career trajectories and workplaces. Within this first theme, three sub-themes in relation to context emerged: mobility, age-related discrimination, and identity as a CMA. Within the second main theme, practices and issues related to learning, eight sub-themes emerged: motives, proximity to retirement, strategic focus, preferred learning processes, the convenience factor, knowledge worth knowing, desired supports, and mentoring.

Based on the findings, the study identified and suggested ways to mobilize and support these learning practices within the multi-generational work community. Specific project activities developed practical recommendations for planners and facilitators of professional learning to better address older CMA workers' needs and challenges. These include: mature CMAs contributing to the professional development of younger CMA professionals through mentoring programs initiated by the CMA professional association; the professional association offering telephone coaching and career mapping, possibly recruiting and training experienced CMAs for this purpose; creating opportunities online for mature workers to facilitate or moderate discussions, answer accounting and management-related questions posed by other members, offer the "expert" opinion and/or different viewpoints or recommendations; coordinating learning events and opportunities with other stakeholders in the CMA learning "circle" – employment agencies and other professional associations; hosting joint workshops and seminars with other related organizations in order to offer a broader and/or deeper range of learning opportunities; cultivating a community of practice in which experienced workers could play a lead role.

## **Informal Learning and the Older Professional Worker: Learning Practices, Challenges and Supports**

### **Overview of Study**

This report presents empirical research exploring learning practices of professionals categorized 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 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. Implications for adult educators and professional development educators focus on understanding these challenges experienced by older professionals, as well as critically questioning existing assumptions about workplace learning, informal learning, and inter-professional collaboration.

### **The Problematic Category of ‘Older Workers’**

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, 2004). 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 Human Resources and Social Development Canada (HRSDC) announced a major Targeted Initiative for Older Workers to help retain or re-integrate older workers into the workforce. Results of our own studies (Fenwick, 2007a; 2003a,b; 2001a) and others’ research suggest that meaningful learning

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activity that is recognized and valued in the organization plays a key role not only in retention, integration and job satisfaction of workers, but also in creating more reflexive, creative, integrative and humane work environments (Bratton et al., 2003; Livingstone & Sawchuk, 2004).

The existing literature on older workers has emphasized that their learning and knowledge is particularly important in the knowledge economy discourse, where emphasis has been placed on fast-changing technological and innovative learning, as well as entrepreneurship 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 characterize 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.

Professional workers, those who receive specialized educational training, are a particularly interesting group to consider in light of such observations given the changes already circulating through their work conditions. In many professions, individuals are pressured to become more flexible and entrepreneurial to adapt to radical shifts in public demands, faith in professional authority, and sharp drops in institutional resources. External accountability requirements and managerial regulation of professionals’ autonomy have increased alongside a new emphasis on externally generated evidence-based knowledge. Expectations for inter-professional

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collaboration have increased with arguably little infrastructure or reward to support genuine collaboration. These dynamics and their consequent tensions can be expected to affect all professionals but perhaps particularly those who are in later career stages.

To date few studies have been completed to examine the informal learning of older professionals, their motives and values around informal learning in work, the challenges they experience in informal learning, the supports they would find most helpful, and the ways in which their informal learning could be documented and evaluated. One issue is recognition: one study concluded that a majority of older workers themselves view learning at work as straightforward skill acquisition rather than as personal and collective change, identity shifts, community building, reconfiguration of practices or innovation. For them learning was about “acquiring skills to survive or observing and experiencing work practices” (Pillay et al., 2003, p. 109). Another issue is ageism, which persists in distribution of work-related learning opportunities. A recent study of provision for Canadian older workers in collective agreements across all provinces and territories (Fourzly & Gervais, 2002) was motivated by evidence that the current shift to a knowledge-based economy and the attendant technological changes have reduced the relative value of some older workers’ previous skills and experience, and necessitated retraining for those who wished to remain employed. The researchers concluded that while collective agreements appear to acknowledge special needs of older workers, “the breadth, depth and frequency of [training opportunities for older workers], as well as the resources allocated to them, vary greatly depending on the sector and the company” (Fourzly & Gervais, 2002, n.p.)

One recent European study of 27 small-medium enterprises in England, Finland and Norway (Tikkanen & Nyhan, 2006) found that while older and younger workers are challenged by the same changes in working life, technology and workplace structures, older workers’ learning is not acknowledged and supported to the extent of younger workers. Older workers are more often called upon to mentor younger workers than to participate in learning opportunities themselves. The study called for more awareness of older workers’ learning needs, greater recognition and valuing of their strengths, and more inclusive support of their lifelong learning including targeted initiatives and promotion of inter-generational learning in the workplace. In fact in comparing



companies in the UK, Fuller and Unwin (2005) found that older workers' attitudes to learning and uptake of opportunities for meaningful workplace learning depended on the way that these opportunities were embedded, supported and managed within a wider culture of workforce development.

### **Learning in Work – Perspectives Used in This Study**

Our approach to understanding learning in work is rooted in perspectives of learning as practice-based and embedded in everyday action (Billett, 2001; Bratton et al., 2003). Learning here is treated not as the outcome of change but as a *process*. In particular, workplace learning can be defined as expanding human possibilities for flexible and creative action in contexts of work. Work learning is intimately linked to people's work identities and sense of self and meaning in their work, which change over the career course (Chappell et al, 2003). Work learning also is social and interactive, and often marked by the changes to the collective that are greater than the sum of changes experienced by any one individual member (Fenwick, 2001b; Rainbird et al., 2004). Finally, work learning is a cultural phenomenon: that is, it involves not just human change, but interconnections of humans and their actions with rules, tools and texts, cultural and material environments. The norms, routines, language, relationships and everyday objects/technologies of a particular professional community of practice or industry shape the generation of knowledge, as well as attitudes about what is considered useful to learn and what processes count as learning (Engeström, 2001; Sawchuk, 2003; Wenger, 1998). 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. All of these dynamics mean that work learning is emergent, embodied and embedded in joint activity, a process of relations and dynamics *among* individual actors and collectives, not a psychological phenomenon within one individual.

### **Study methods**

This project explored whether the dynamic of 'age' and its various meanings played a significant role in professionals' learning and conditions of practice by studying the learning practices of Certified Management Accountants (CMAs). The study combined survey and interview methods. 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

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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 (tax season). Of these, 34% identified themselves to be 50+ years of age. Thirty-eight per cent of the 50+ years of age respondents were women and 62 % were men. From the submitted surveys, we received over one hundred requests for a personal interview, which was surprising to both the professional association and ourselves. 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.

### **Findings**

Two main themes emerge from the interview and survey data: career context of older CMA workers and the practices and issues related to the learning of older CMA workers. Within the first theme, career context, the way CMA professionals engage in learning, and *what* they are learning, is determined within the contexts of their career trajectories and workplaces. Within this first theme, three sub-themes in relation to context emerged: mobility, age-related discrimination, and identity as a CMA.

#### **The Career Context of Mature CMA Professionals**

*Mobility:* The current booming Alberta economy is making it easier for older workers to be mobile in their careers. Some are experiencing greater ease currently to find work, less ageism when looking for work, organizations more focused on recruitment and retention, including retention of older workers.

*Age-related discrimination:* Several participants indicated that generational politics, the conflicts and misunderstandings between generations, existed in their workplaces. While approximately 50% of survey respondents indicated they had experienced some age-related discrimination in the workplace, only a few of interview participants discussed experiencing prejudice. Even within the robust economy, they were experiencing some difficulties in locating employment

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within their professional field, moving to another organization, or receiving promotions and recognition within existing organizations. Others felt they had not experienced discrimination partly because they were in positions of power or they felt their years of experience and knowledge was valued within their organizations.

*The CMA identity:* The majority of CMAs interviewed were very proud of their CMA designation, as they believe it will be useful in (semi) retirement. Several participants actively promote the CMA designation. However, tension existed among the participants over the focus of the profession. Some indicated they had moved away from the accounting aspects of the profession into strictly management roles while others still required a strong grasp of accounting skills to complete daily work tasks. The focus on one's work affected the types of learning they engaged in and the types of supports expected from the professional association.

### **Practices and Issues Related to the Learning of Mature CMAs**

Eight main sub-themes emerged in relation to the learning practices of mature CMAs: motives, proximity to retirement, strategic focus, preferred learning processes, the convenience factor, knowledge worth knowing, desired supports, and mentoring.

*Motives:* There was a constant assessment of the value added by learning something new or continuing to stay on top of a particular knowledge area. The professionals interviewed carefully considered relevance, convenience, flexibility, and return on investment of time, energy, and money when making decisions about their learning. Although most of the participants seemed very resilient and resourceful in planning and executing their learning and their career plans, some participants seemed to need help learning how to leverage their knowledge and skills into next career steps.

*Proximity to retirement:* Imminence of retirement and the nature of their retirement plans impacted learning practices. Survey results indicated that 35 to 42% of mature CMAs have a declining interest in CMA-related learning because of anticipated retirement. In interviews, some were excited about new learning opportunities and had taken on jobs or work that demanded significant learning. Still others were strategic, assessing their ability to leverage and

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benefit from learning a significant new skill set so close to retirement. Others took the company perspective and described the importance of training opportunities going to “the person down the hall who will be in this position in a few years”, replacing themselves. *Strategic focus:* What to learn and how to go about it were thoughtful strategic decisions. Professional development needs and appropriate activities at 60 were viewed as different to those at 30 or at the beginning of one’s CMA career. These older CMA professionals were strategic about what learning opportunities they pursued. Time, efficiency and effectiveness were hallmarks of their learning decisions and processes. Older CMAs are discriminating, and have a sense of their capability and freedom to choose learning.

*Preferred learning processes:* Although it is not surprising that participants preferred a range of learning approaches, there were certain common themes in how they engaged in the process of learning and the issues that emerged. Older professionals say they want depth, not breadth. Older professionals do not want to be told how to learn. The Internet has emerged as a major source of self-directed learning and a major shift in people’s learning practices over their careers. Survey results indicate 45% of women and 39% of men use websites, blogs and webinars to learn informally about their careers. Learning was often tightly integrated with the rhythm of their work and so was not regarded as an extra “thing” to do. Learning was wrapped up with the nature of the work and in fact, learning *was* the work in some aspects. This type of learning was seen to be very effective. While many participants understood the need and importance of documenting their learning for professional development purposes, the learning they valued most was difficult to verify because it happened informally. Therefore, they expressed a desire for ways to document and receive professional development credit for their informal learning

*The convenience factor:* Coupled with their strategic focus on what to learn and how, convenience, relevance and flexibility of learning opportunities was important. Juggling other demands was a key barrier to attending learning events. These included job, health and family demands.

*Knowledge worth knowing:* Older professionals experience both a narrowing down and opening up of learning interests depending on their professional context. For some, “solid” accounting

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skills were “part and parcel” of a CMA designation and no matter what work one went on to do, these skills should remain usable. Still others perceived that they did not really need their day-to-day accounting skills any longer as they were focused on more strategic management work. Older professionals (some) wanted opportunities to “brush up” on skills acquired earlier in their careers. Older professionals valued contextual knowing and knowing oneself. Other knowledge worth knowing was less management or accounting related but rather focused on managing one’s career.

*Desired supports:* Many turned to their workplace or other organizations for learning support and did not expect CMA Alberta to be a provider for all their learning needs. Older professionals had questions about what should count as professional development. Professional development needs and appropriate activities at 60 are viewed as different to those at 30 or at the beginning of one’s CMA career. Many identified a tension between getting professional development points versus getting the learning one needed the way one wanted it – the focus might change as one became older, suggesting a need for more flexible professional development policies.

*Mentoring:* Mentoring younger colleagues emerged as a unique component of the learning practices of more experienced CMA workers. Survey results indicate that 47% of women and 50% of men have a greater focus on teaching others than learning for themselves. In interviews, some participants expressed a desire for mentoring opportunities to be fostered and supported through the professional association.

### **Conclusions and Implications**

What are the unique approaches and challenges experienced by older professionals in work-related learning? The findings indicate that older professionals are strategic in their learning. Limited time in addition to work-related and personal responsibilities mean that learning opportunities have to be relevant and flexible. Older professionals desire to continue learning, but in an environment where they can exercise greater independence over their learning. Because their learning was tightly integrated into the day-to-day routines and problem-solving dimensions

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of their work, they expressed a desire for more flexible professional development policies around the ways their learning is documented and assessed.

While many of the older professionals in the study expressed a high level of autonomy over their learning, some challenges were articulated with respect to career context and being an older professional. 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 biologized 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, particularly by younger generations. 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' particularly in relation to technological advances in the field. Mentorship is a role they may be assumed to want to engage in organizations.

While most older professionals participating in the study indicated that it was important to document their learning, the findings indicate that continuous learning of the sort promoted through the CMA professional association sometimes did not address the learning and professional issues deemed most important by the participants. Continuous learning provided by 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 professional development (PD). Typical delivery methods (mini-lectures, case study learning, 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

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knowledge was under-recognized in PD offerings. Most believed that their CMA-related knowledge interests as older professionals were much different to those of their younger colleagues.

Based on these findings, the researchers have recommended several initiatives that can be undertaken by the CMA professional association to employ more effectively the knowledge and experience mature CMAs have to offer to the provincial association and the profession generally.

- (1) Mature CMAs can contribute to the professional development of younger CMA professionals through mentoring programs initiated by the CMA professional association.
- (2) Although most of the participants in the study were employed, several indicated that as they matured, finding employment became more challenging and often took longer to find than when they were younger. Therefore, the professional association could offer telephone coaching and career mapping, possibly recruiting and training experienced CMAs for this purpose.
- (3) Create opportunities online for mature workers to facilitate or moderate discussions, answer accounting and management-related questions posed by other members, offer the “expert” opinion and/or different viewpoints or recommendations.
- (4) Consider coordinating learning events and opportunities with other stakeholders in the CMA learning “circle” – employment agencies and other professional associations.
- (5) Consider hosting joint workshops and seminars with other related organizations in order to offer a broader and/or deeper range of learning opportunities.
- (6) Consider the role of the CMA Society in cultivating a community of practice in which experienced workers could play a lead role.

Many themes here are salient to the emerging research focus on the so-called ‘older worker’. The findings outlined in this report indicate further research possibilities: (1) how and which ‘age-appropriate’ technologies of pedagogy need to be deployed in professional development contexts; (2) how can professional development evaluation criteria be developed to address the learning context of mature professionals; (3) how does ‘generational jostling’ and the discourses of age influence professional development and workplace learning.

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## Appendix A

### Electronic Survey Questions

Welcome! This survey examines approaches to professional learning and development used by Certified Management Accountants, and your responses are important. The results will be used to build knowledge about professionals' learning, and to enhance the particular supports for learning provided to CMAs. The study is conducted by researchers at the University of British Columbia (Dr. Tara Fenwick, PhD and Tara Gibb, PhD student), in partnership with CMA-Alberta.

#### 1. Professional Development

1.1 What materials and resources do you use to learn informally about your career as a CMA (informal learning is learning that occurs outside specific education and training programs)? Please select the three (3) you use most.

- a. Websites developed by the professional association to which you belong
- b. Other websites, blogs, and webinars
- c. Software programs
- d. Professional books and publications
- e. Face-to-face conversations
- f. Newspapers
- g. Manuals of regulations
- h. Conversations with clients
- i. Observing other colleagues
- j. Figuring out a new problem on your own
- k. Figuring out a problem with a team
- l. Reflecting on your everyday work
- m. Mentoring a younger colleague
- n. Other \_\_\_\_\_

1.2 What for you are the most important concepts and skills that you learn informally about your work as a CMA? Please select the top three (3) for you from the following list.

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- a. Implementing new regulations
- b. Solving problems
- c. Using new software
- d. Planning strategy
- e. Handling office politics
- f. Working with clients
- g. Managing staff
- h. Training others
- i. Equity issues: gender, race/ethnicity, disability, ageism
- j. Other\_\_\_\_\_

1.3 What are the three (3) biggest challenges to your informal learning in your career as a CMA?

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1.4 Which ways would you prefer to document your informal learning? Please select the top three (3).

- a. Regular self-written reflection, such as a journal
- b. Regular self-assessment using charts or lists
- c. Guided personal reflection with a partner
- d. Guided dialogue with a group
- e. Observation of your work by someone else
- f. Self-administered tests
- g. Annual written report on learning goals achieved
- h. Annual oral interview on learning goals achieved

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i. Other \_\_\_\_\_

j. None – you do not want to document your informal learning

1.5 How often do you attend professional development programs/workshops/courses?

a. Once a month

d. Once every two years

b. Once every six months

e. Once every two to five years

c. Once a year

f. Almost never

1.6 In some work contexts, mature professionals who want more learning opportunities say that they experience exclusion from informal learning opportunities that younger workers don't face (according to the literature a mature professional is someone 50 years or older). In your experience and observations as a CMA, is this true?

a. Never

d. Always

b. Sometimes

e. Don't know

c. Frequently

1.7 Some literature suggests that mature professionals pursue learning less frequently than novice and mid-career professionals. Which of the following are reasons why mature (50 years and older) CMA professionals may not pursue learning opportunities in your experience? Please select the top three (3) for you from the following list.

a. No perceived need for further competence development

b. Low priority placed on own CMA-related learning

c. Learning opportunities are uninteresting or inappropriate to the needs of mature CMA professionals

d. Declining interest in CMA-related learning because of anticipated retirement

e. Lack of opportunity for professional learning (e.g. job is routine, geographic isolation)

f. Greater focus on teaching others than learning for oneself

g. Other \_\_\_\_\_

h. Don't know

1.8 In some work contexts, people over 50 years old say that they experience age-related

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discrimination. In your experience and observations as a CMA, is this true?

- a. Never
- b. Sometimes
- c. Frequently
- d. Always
- e. Don't know

### 2. Demographic Information

Please circle the answer that most accurately represents you.

2.1 Gender

- a. Female
- b. Male

2.2 What is your year of birth? \_\_\_\_\_

2.3 How many years have you been working as a certified management accountant (fulltime and part-time)?

\_\_\_\_\_

2.4 What is the approximate total number of employees working within the organization for which you work (including fulltime, part-time, contractors, etc)?

\_\_\_\_\_

2.5 What is the approximate population of the centre in which you conduct most of your work as a CMA?

- a. 1,000 or less
- b. 1,001 to 5,000
- c. 5,001 to 10,000
- d. 10,001 to 50,000
- e. 50,000 to 100,000
- f. 100,001 to 300,000
- g. 300,001 to 500,000
- h. 500,001 to 1,000,000

2.6 Are there any other comments you would like to add about your informal learning and/or professional development as a CMA?

\_\_\_\_\_  
\_\_\_\_\_

2.7 If you are 50-64 years of age and a practicing CMA professional, would you be willing to be contacted for a telephone interview to talk further about your professional learning and career

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development as a CMA? In our next phase of this study, we plan to focus more deeply on the learning approaches of mature “older” CMAs.

- a. Yes                      b. No

If you chose “yes”, please complete the information below.

Name \_\_\_\_\_

Email \_\_\_\_\_

Daytime phone number \_\_\_\_\_

## Appendix B

### Data Tables from Electronic Survey

Email invitations were sent to 5487 registered CMAs in Alberta to participate between March 14 and 28, 2008 in the web-based survey: a total of 816 responded. Of these 34% identified themselves to be between the ages of 47 and 70. The tables on the following pages provide a summary of the responses based on gender and age in percentages.

For questions 1-1, 1-2, 1-4, and 1-7, participants were asked to select their top 3 choices from the provided list of responses. Question 1-3 asked respondents to provide written text on the biggest challenges to their informal learning. This information has been integrated into the findings section of the report.

#### **Q 1-1: Resources mature CMAs use to learn informally about their career (top 3 used most)**

	Age 47-56		Age 57-70	
	Female	Male	Female	Male
<b>Websites developed by CMA association</b>	50	45	30	41
<b>Other websites, blogs, webinars</b>	46	41	35	36
<b>Software programs</b>	16	12	30	20
<b>Professional books and publications</b>	77	74	60	72
<b>Face-to-face conversations</b>	42	38	45	49
<b>Newspapers</b>	33	38	45	36
<b>Manuals of regulations</b>	11	18	20	23
<b>Conversations with clients</b>	7	12	20	28
<b>Observing other colleagues</b>	2	1	1	2
<b>Figuring out a new problem on own</b>	34	24	45	34
<b>Figuring out a problem with a team</b>	32	25	35	21
<b>Reflecting on your everyday work</b>	14	12	15	16
<b>Mentoring a younger colleague</b>	16	19	25	28
<b>Other</b>	0	1	1	1

**Q 1-2: Most important concepts and skills mature CMAs learn informally for their work as CMAs (top 3)**

	Age 47-56		Age 57-70	
	Female	Male	Female	Male
<b>Implementing new regulations</b>	29	30	30	28
<b>Solving problems</b>	74	76	80	66
<b>Using new software</b>	37	20	30	26
<b>Planning strategy</b>	57	54	40	56
<b>Handling office politics</b>	24	16	15	15
<b>Working with clients</b>	17	25	30	38
<b>Managing staff</b>	56	47	25	44
<b>Training others</b>	32	28	45	33
<b>Equity issues</b>	5	5	0	5
<b>Other</b>	5	5	5	5



**Q 1-3: Mature CMAs preferences for documenting informal learning (top 3)**

	Age 47-56		Age 57-70	
	Female	Male	Female	Male
<b>Regular self-written reflection, such as a journal</b>	28	35	25	36
<b>Regular self-assessment using charts or lists</b>	53	49	65	43
<b>Guided personal reflection with a partner</b>	6	10	5	10
<b>Guided dialogue with a group</b>	5	9	5	13
<b>Observation of your work by someone else</b>	6	9	10	16
<b>Self-administered tests</b>	21	18	5	18
<b>Annual written report on learning goals achieved</b>	25	31	35	33
<b>Annual oral interview on learning goals</b>	11	8	5	9
<b>Other</b>	12	11	0	7
<b>Do not want to document informal learning</b>	45	35	55	30

**Q 1-5: Mature CMAs frequency of attending professional development programs/workshops/courses**

	Age 47-56		Age 57-70	
	Female	Male	Female	Male
Once a month	21	15	5	20
Once every six months	54	52	60	41
Once a year	14	22	25	21
Once every two years	5	4	0	5
Once every two to five years	2	2	0	5
Almost never	3	5	10	7

**Q 1-6: Mature CMAs who experience exclusion form informal learning because of age**

	Age 47-56		Age 57-70	
	Female	Male	Female	Male
Never	35	44	25	44
Sometimes	31	31	40	33
Frequently	8	8	10	8
Always	3	2	0	2

**Q 1-7: Reasons mature CMAs may not pursue learning (top 3)**

	Age 47-56		Age 57-70	
	Female	Male	Female	Male
<b>No perceived need for further competence development</b>	31	42	35	36
<b>Low priority placed on own CMA-related learning</b>	24	28	20	31
<b>Learning opportunities uninteresting or inappropriate to needs of mature CMAs</b>	49	47	50	52
<b>Declining interest in CMA-related learning because of anticipated retirement</b>	40	42	35	36
<b>Lack of opportunity for professional learning</b>	28	25	35	20
<b>Greater focus on teaching others than learning for oneself</b>	46	48	50	52
<b>Other</b>	18	15	20	18

**Q 1-8: Mature CMAs who experience age-related discrimination**

	Age 47-56		Age 57-70	
	Female	Male	Female	Male
<b>Never</b>	41	41	25	48
<b>Sometimes</b>	35	45	55	44
<b>Frequently</b>	11	4	10	3
<b>Always</b>	1	1	5	2

## Appendix C

### Telephone Interview Script

1. Demographic information
  - a. Name of company:
  - b. Size/number of employees:
  - c. How many years have you been working as a CMA (fulltime, part-time) cumulative total?
  - d. When did you complete achieve certification?
  - e. Which age bracket do you fall into: 45-49, 50-54, 55-59, 60-64, 65- 70?
  - f. Who do you interact with most on a daily basis at work (e.g. other CMAs, support staff, etc.)?
2. Tell us about your workplace context. What are some of the unique characteristics of your workplace environment and your job and responsibilities there as a CMA? Who do you interact with on a daily basis?
3. What changes to your career path, if any, have you experienced in the last five to ten years? (e.g. illness, coping with aging parents, etc.)

Probes: Did your workplace offer you any accommodations? Were they your preference? How did you feel about the accommodations? If you had to go back out into the job market to look for a job, how was the experience?

4. What differences, if any, have you experienced in the way you're treated now at your workplace compared to 5 to 10 years ago? - adjust time frame according to age (e.g. 5 to 10 years, 10 to 15 years, etc.)

Probe: treatment by colleagues, clients, supervisors

5. What differences, if any, have you noticed between your knowledge and the knowledge of younger CMA professionals?
6. What for you are the most important concepts and skills you continue to learn? How are you learning them and what are the most important resources for you?

Probe: What are they learning and how are they learning?  
What supports are most helpful to their learning (materials, support from CMA-Alberta)? Why are they important?

7. What are the major differences you note in the way you approach your career and your learning now compared with 5 to 10 years ago?

Probe: be sure to focus on the learning piece

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8. What supports for learning are inappropriate to the needs of mature CMAs? What supports for your learning would you like to see provided by CMA-Alberta?