



# PANORAMA

## Innovative learning measures for older workers







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# Foreword

Addressing the issue of an ageing European workforce not only requires public socioeconomic measures to promote the employment of people over their life course, but also the commitment of workplaces to 'age management'. From an organisational perspective, continuous learning and development are necessary for survival in increasing competitive markets but they also have an impact on the quality of working life and its attractiveness from the point of view of workers. From an individual employee's perspective, learning and development carry various meanings and significance. First, they appear as a means to maintain one's potential for high-quality performance and also one's employability. Second, the existence of learning opportunities is potentially a strong motivator, both for a high job performance level and for engaging in further professional development. In particular, for an older worker being offered opportunities and support to participate in organised learning, leads to a feeling of being valued, appreciated and needed.

Learning cultures in workplaces are rarely supportive of older workers. Traditionally, older workers are considered teachers and mentors of younger employees, rather than having learning needs themselves. Thus, when the workplace does not require them to change their job tasks, this gives rise to a feeling of why bother to engage in training? In addition, older workers' images of themselves as learners tends to be poor, giving rise to a self-fulfilling prophecy.

The worlds of work and learning can no longer ignore the increasing number of older workers in society. Innovative work practices and learning measures for older workers are required. Cedefop is concerned with promoting lifelong learning practices that enable people of all ages to have more active, productive and fulfilled working lives. This why it decided to gather in this book practical examples of private, local, regional and national initiatives and learning opportunities addressing the specific needs and profile of older workers. It is hoped these examples will generate practical insights into key success factors and challenging issues.

Aviana Bulgarelli  
Director of Cedefop

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# Chapter 1. Introduction: innovative learning measures for older workers

*Tarja Tikkanen, Barry Nyhan*

Devising attractive lifelong learning (LLL) measures to address the needs of mature employees, is a challenging task. The challenge has as much to do with changes in the world of work (workplaces) as the need for new policies in learning (training institutions). Further, good practice in one context can be difficult to transfer to another. Forecasts indicate that 'the story of the future is labour shortages' <sup>(1)</sup>. Already this is true for several occupational areas and countries. Thus, the worlds of learning and work can no longer ignore the increasing number of older workers in society. Innovative work practices and learning measures for older workers are required.

This book is the second product of the Cedefop older workers and lifelong learning (OWLL) network, initiated in 2004. In the first book, *Promoting lifelong learning for older workers: an international overview* (Cedefop, Ohsako and Sawano, 2006), the focus was on presenting research and statistical perspectives on the sociopolitical landscape in Europe and beyond. The book concluded that a new mindset on the interrelationship between work, learning and ageing is required. The orientation of this follow-on book is practical. The focus is on describing local, regional and national learning initiatives and measures for older workers.

## 1.1. Learning opportunities – a broader issue than competence development

A recent major survey, *What is good work?* (INQA, 2007), showed that after income, aspects related to learning and competence development (further education) at work cause the most dissatisfaction for employees. From a national macro perspective, investment in skill development can be directly linked to a nation's capacity for innovation and growth (Norwegian Ministry of Trade and Industry, 2003). From an organisational perspective, continuous learning and development are not only necessary for survival in increasing competitive markets but they also have an impact on the quality of working life and its attractiveness from the point of view of workers. From an individual employee's perspective learning and development carry various meanings and significance. First, they appear as a means to maintain one's potential for high-quality performance and also one's labour market value (employability). Second, the existence of learning opportunities is potentially a strong

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<sup>(1)</sup> Kenneth Rogoff, a Harvard Professor and former chief economist of the International Monetary Fund, quoted in Bennholdt, 2007.

motivator, both for a high job performance level (doing one's best) and participating in further professional development activities. In particular, for an older worker being offered opportunities and support to participate in organised learning, leads to a feeling of being valued, appreciated and needed. Several chapters in this book illuminate this. In addition, the possibility to develop one's resources promotes one's personality (INQA, 2007) and contributes to overall workplace wellbeing (Tikkanen, 2005), as well as acting as a buffer against strain resulting from work (INQA, 2007).

## 1.2. Experts at work, but often novices in learning

When it comes to providing learning opportunities, much has happened during the past 15 to 20 years, although this has varied notably between occupations and branches, and across countries (Cedefop, Lipinska et al., 2007). For many older, often low-educated, workers these opportunities have not been available. In some cases companies offer them to all employees, but in practice older workers tend not to respond to them. A Eurobarometer survey from 2004 found that a third of older workers older than 55 do not know what would encourage them to undertake more training (ibid.). There are various reasons for this, both cultural and pragmatic. The following are some of the most central issues:

- (a) learning cultures in workplaces have rarely been supportive to older workers. Older workers tend to have reached the top of their career possibilities, and in small companies and flat organisations more generally, 'the glass ceiling' tends to be low;
- (b) older workers' image of themselves as learners tends to be poor, giving rise to a self-fulfilling prophecy. As several chapters in this book show, while older workers have expertise in work, they are often novices when it comes to learning;
- (c) traditionally, 'the competence order' in workplaces (the degree to which one manages one's job tasks) has followed 'the social order', which is a result of one's years of experience in a company. More experienced employees are often considered to be more competent employees. Traditionally, older workers are considered as teachers and mentors of younger employees, rather than having learning needs themselves (Cedefop, Tikkanen, 2006). Thus, when the workplace does not require them to change their job tasks, this gives rise to a feeling of why bother to engage in training;
- (d) related to the above, the relevance of the training on offer is often an issue for older workers. Older workers have broader perspectives, greater understanding and sounder judgements than their less experienced counterparts. Thus, they tend to be more critical consumers of training products. The balancing and contemplation often takes place between what is their current situation and what could it be after taking more training.

As pointed out in the chapters, in this and other publications on older workers, it is important that learning strategies address the above issues. It is necessary to build comprehensive, holistic approaches (Walker, 1997) in which competence development is only one aspect in the total change process.

### 1.3. Overview of the chapters

The book is divided into two parts. The first is based on experiences from the private sector, mainly from industrial companies. Three chapters describe successful workplace learning initiatives for older workers, falling under human resources development (HRD).

The second part describes four learning innovations in the public sector, dealing with: a governmental programme; a large state agency human resource management initiative; a regional government training and employment project; and a national vocational training/HRD and employment initiative. A brief introduction to the seven policy initiatives or measures presented in the book is given below.

The chapter by Wolfgang Mai presents a company case from Siemens and how the works council plays a major role in promoting competence development for older workers. The Siemens Compass project takes a broad approach to the workplace situation of older workers. The goal is to help older employees to want and be able to change and develop their careers, and take responsibility for their own work situations. The results of the Compass project have been convincing, so much so that it has become one of the company's main instruments to promote Siemens' learning culture.

From the perspective of age-management, Bénédicte Gendron presents three case studies from France on ways to promote active ageing. The cases represent very different sectors: TV station France 3; Lionet Décor (an SME) dealing with services; and Cedilac a dairy products company. While all the cases promoted learning for older workers, they followed different methods and project designs. France 3 developed a tool for employees in mid-career to open up new roles, based on their experience, for example as trainers or mentors. The overall approach to personal development was age-integrative rather than age-segregating. Lionet Décor trained internal tutors to undertake an intergenerational competence transfer project in the company. The project also motivated younger workers, who gained systematic access to competence held by experienced workers. Further, a tool for identifying and documenting these competences was developed, resulting in a reference guide for occupational groups in the company. Cedilac also launched an intergenerational training and competence transfer project. The company developed a digital tool to document the experience-based competence of older workers, which also resulted in a compilation of solutions for various problems in the production processes. Gendron presents the cases in a HRD theoretical perspective focusing on an intergenerational approach to 'ageing, living and working well together'.

The chapter by Jürgen Wilke is based on a pilot study in which work-integrated learning methods were tested in mixed-age teams in companies. Two industrial company cases are presented. The pilot study set out to transform these companies into learning organisations based on organisational and HRD concepts. Within a community of practice framework (Lave and Wenger, 1991), seen as a sound basis for work-based learning among older workers, the case of Ruch Novaplast exemplifies how older experienced workers became

in-house trainers for less experienced employees. Special attention was placed on the benefits, which participation in the pilot project would bring at all levels in the companies: individual, team and the organisation as a whole. As a project by-product a new tool (card technique) was developed in Walter Steinbach to assist the recognition and documentation of experience-based competence.

Kirsti Hulkari and Susanna Paloniemi present a major government programme, NOSTE (2003-07), to raise the education level and employment rate of low-educated adults in Finland. The NOSTE programme is one of several government initiatives addressing the demographic challenge. This social innovation corresponds to the Swedish adult education initiative *Kunskapslyftet* (knowledge lift) in the 1990s (SOU, 1998). The projects funded by the programme formed 60 large networks of education and training providers and social partners promoting LLL for low-educated adults throughout the country. A third of the participants in the various training activities were older than 50. The various activities were: formal training; outreach activities offering support and counselling for basic learning skills; cooperation and networking between training institutions; development of models for bringing learning closer to workplaces. This chapter describes some of the successful results of the programme but also the problems faced and lessons learned along the way. It outlines the challenges, which adult education and training institutions need to meet when faced with non-traditional adult learners such as older and/or low-educated people. It discusses why so few older workers are interested in training, even if they are interested in learning.

The chapter by Renée S. Fredericksen presents the case of rebuilding the human resource management of the Minnesota state operated services (SOS) healthcare system in the US. A team of older employees developed a new HRD system for SOS between 2002 and 2006. The system focused on competence and performance reviews, and supported a systematic, needs-based provision of integrated and continuous training and opportunities for LLL for employees. While evaluation of the outcomes has only recently started, the initial reactions of the older workers to the new competence-based system have been more positive than negative. Benefits have included: intergenerational learning, improved flexibility and systematic organisation and provision of training, having also positive organisational effects (for example on staff retention, conflict resolution and management). There was also improved communication and cooperation between the SOS and training providers within a LLL perspective.

A regional LLL innovation for older unemployed male workers in northern Sweden is presented by Hanne Randle, Torbjörn Persson, Maria Modin and Ingalill Eriksson. The goals of the project were to improve older male workers' employability and create job opportunities for them, while at the same time creating favourable conditions for recruitment to the public healthcare sector. The chapter describes how it is possible to break the traditional, gendered work patterns through radical retraining and, thereby, improve the match between labour supply and demand within a region. The authors discuss how the project's success depended on two major factors. The first was the total devotion and commitment of a leading person, an ardent soul, throughout the process who was determined to reach the goal of the

project. The second factor was the strong, strategic and broad-based regional collaboration between different relevant public bodies (employment, training, healthcare) who made radical changes to long established rules and regulations governing the functioning of and interrelationship between these bodies. This project also resulted in new thinking about traditional training provisions and organising learning and support for groups such as male older workers <sup>(2)</sup>.

The chapter of Toshio Ohsako and Masahide Suzuki opens with a review of the main labour market and LLL challenges in Japan. The authors go on to describe learning initiatives targeted at older workers in two regions, Tokyo and Chiba, and present the activities of the national HRD organisation in Japan. The effectiveness of national policy and legislation, providing a framework for a decentralised LLL infrastructure for older people is discussed. Besides a legislative framework, the existence of broad-based local, regional and national cooperation between various public bodies, industry, non-governmental organisations, various local and national organisations, and even media is seen to be important for success. LLL opportunities for older workers were developed taking the local labour market situation and needs as a starting point. Also, competence development took place in close connection with support and guidance services for (re)employment. The authors point out how the latter is one of the main features of Japanese LLL policy. Due to the initiatives described by Ohsako and Suzuki, and many other corresponding regional and national projects and programmes (Cedefop, Ohsako and Sawano, 2006), a wide variety of LLL opportunities are now available to older learners in Japan.

#### 1.4. Some lessons arising from the cases

While it is hoped that the examples presented in this book will generate practical insights for readers, they are not necessarily meant to be blueprints to be copied and applied elsewhere. A good example or good practice in one context often cannot be transferred to other contexts which have their own unique features. However, while the learning innovations presented here are context bound and vary significantly in scope and method, some lessons can be drawn. Therefore, a few brief comments are made below on key success factors and challenging issues:

- (a) it is necessary to plan learning/training and employment strategies and practices for older workers in an integrated manner. They are to be seen as parallel and mutually supporting activities;
- (b) the cases show that it is important to develop learning and training provisions, which are employment-driven, addressing local labour-market demands (cases: Japan, Sweden);
- (c) workplace investment in learning opportunities for older workers functions a massive motivating factor for them, being a sign of appreciation of their contribution;

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<sup>(2)</sup> A personal story of a participant in this project can be found in Cedefop, Randle (2006).

- (d) older workers are also older learners. Thus, learning opportunities need to be coupled with strong learning support in areas such as learning skills and studying skills, IT skills, etc. In the case of unemployed older workers basic job-search topics such as writing a CV or preparing for a job interview, must be included;
- (e) the cases described in the second part of the book show the importance of national policies in promoting the development of learning opportunities for non-traditional older workers;
- (f) promoting the learning of older workers can at the same time help companies recognise and document their core competences. This can make them more aware of their skills base as well as get a better, more informed perspective on further learning and training needs;
- (g) in the company (HRM) cases (France, Germany), a tool for documenting the company's previously non-articulated competence emerged as a by-product. In essence, this competence represents the experience of the older workers.

At this early state of the development of learning approaches, methods and tools for older workers 'all the flowers must be allowed to bloom'. However, as pointed out by Ohsako and Suzuki in their chapter, it is important to include programme and project evaluation, preferably right from the beginning. This should be carried out in a collective and continuous (formative) evaluation mode through which all of the actors learn from each other about how to devise learning policies and practices for an active ageing society.

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# Part I

## Human resources innovations promoting learning for older workers

# Chapter 2. Competence development for ageing employees in Siemens. The Compass process from the point of view of the works council

*Wolfgang Mai*

## Abstract

Against the background of demographic change, competence development becomes a crucial matter particularly with regard to the capabilities of self-management and self-regulation of employees. In the future only those companies able to maintain performance and efficiency of their employees will survive. To maintain and increase competitiveness in a challenging international market companies need motivated, high-qualified and innovative employees. This paper presents the Compass process, which has proved a reliable and an effective way to boost and foster vital key competences at Siemens. Based on a high level of self-perception, the process strengthens the willingness and ability of individuals to take control of their own development in job and private life (self-efficacy). The key is to find self-motivation. The works council supports this process, because it feels confident that this instrument is very important in the context of demographic change. In the view of the works councils not only the individual, but also the company benefits. The department of personnel development of Siemens has one aim: 'the right person at the right place'. Improving individual self-management skills meets the expectations and needs of employees and helps create a culture in which employees themselves are eager to find the position which fits best their needs and capabilities. The Compass process is an effective instrument that produces sustainable results.

## 2.1. Introduction

Discussion on the consequences of demographic change in German society witnessed a shift of emphasis. After discussing the consequences for systems of social security, it now takes a broader view. An increasing number of German companies, especially in the production sector, are trying to find answers on how to manage an ageing workforce. The automobile industry carried out some important experiments. There are also a lot of good examples within smaller companies, which have, due to demographic change, growing difficulties hiring skilled workers, because larger companies are more attractive and seem to offer more secure employment and better salaries.

Demographic change and its impact on company structures were already predicted 12 years ago, at least. In 1994, the German government commissioned a German research institute to analyse the upcoming challenges, but little interest was shown at the time by

companies <sup>(1)</sup>. Discussion within the German economy was (and still is) mainly driven by the German unions, basically by the confederation of German trade unions (DGB), IG Metal and Verdi. However, lately entrepreneurs also began to reflect upon upcoming challenges for their companies <sup>(2)</sup>.

Although there is growing awareness and first steps have been taken, there is still a lot of work to do on the consequences of ageing for the so-called white-collar workers, employees with high qualifications and large responsibility, such as project engineers, software developers, business administrators, researchers, etc. (Heidermann and Herzer, 2006). In 1998, Siemens established the Compass process. It was not originally designed to tackle demographic change and its consequences for the company and employees. It was only later that the human resources department decided to use Compass to address the willingness and capability of 'older' employees to change and develop their own careers (Mai, 2004; Raabe et al., 2004). Taking responsibility for oneself and acting independently to find a place within the company should lead to a match between the opportunities within Siemens and the needs and competences of its employees.

Before presenting the Compass process itself, we will describe the consequences of demographic change on the growing group of older employees. This is useful to demonstrate how the original objectives of the project unintentionally gained importance in a company facing demographic change.

## 2.2. Consequences of demographic change for employees and companies

According to unions and operational lobby groups, the consequences of demographic change must be seen mainly from the point of view of employees, especially white-collar workers. As in many companies in Germany, the age structure of Siemens is 'compressed', the average age is about 40 (Figure 2:1; Buck et al., 2002). In 10 years time, the greatest age cohort of Siemens employees will be between 50 and 65. This cohort represents senior experts, who already bear the brunt of work. This is not alarming in itself, but challenges appear when the working conditions of these employees are considered (DGB, 2006). That is why the Compass process is of great significance to us.

Not only have all employees to work longer because statutory retirement in the future will be at the age of 67, but working conditions are more and more threatening to their health and wellbeing (Paoli and Merllié, 2000). This combination of factors is the main issue raised by

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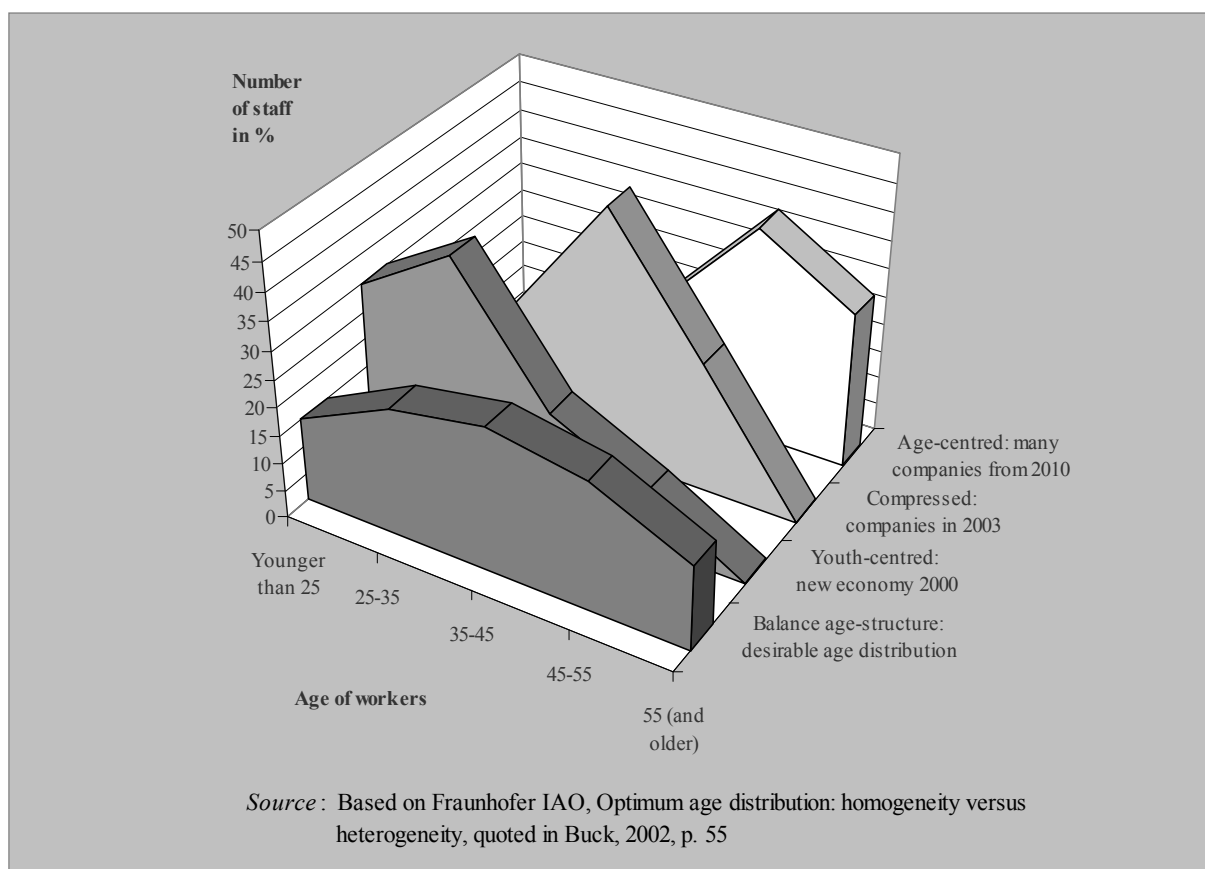
<sup>(1)</sup> For further information see the website of this initiative available on Internet: [www.demotrans.de](http://www.demotrans.de) [cited 16.1.2008] [in German].

<sup>(2)</sup> The German association of entrepreneurs (BDA) conducted the project 'proage' at European level. The homepage of the project is available from Internet: <http://www.proage-online.de/proage/start.nsf> [cited 16.1.2008].

demographic change for lobby groups. For companies other issues are raised, such as maintaining competitiveness, performance and productivity with an ageing workforce.

In 2004, the works council Germany of the Siemens AG started a project to analyse the consequences of demographic change for the company and for possible new tasks of the works council itself (Bolduan et al., 2005). With regard to current and future working conditions, there will be an ongoing need for reorganisation, restructuring and outsourcing with job losses in Germany. Companies and employees have to react to these challenges. Economic success and individual employability (wellbeing, health, good communication, work-life balance and up-to-date qualification) will increasingly depend on one another.

Figure 2:1 Types of age structures in German companies



The ageing of the workforce may not lead to special strategies for older employees only. We need a lifelong strategy for all employees, especially for those between 40 and 50. For the works council, the aim is successful health and competence management to maintain, improve and encourage managers and employees. However, employees themselves have to accept personal responsibility.

There are no simple answers to the question of what has to be done to reach these objectives and what concrete steps have to be taken in the company. The measures may vary from company to company, from department to department but the fields of action are quite clear: health, labour organisation and job design, leadership, qualification (continuous

education and LLL), personal policy, and corporate culture (INQA, 2004, p. 18-22). Box 2:1 shows the fields of action in which the German works council reviewed existing policies and procedures with the company to find ways to address demographic change and improve working conditions (Paoli and Merllié, 2000).

*Box 2:1: Central fields of action for German works councils to address demographic change in companies*

Leadership:

- adjusting corporate culture;
- personnel policy und recruiting policy;
- personnel policy has to react early enough and in sufficient time to face an ageing workforce.

Qualification, continuous education and LLL:

- knowledge management.

Health:

- work ability for all employees.

Labour organisation and job design:

- not only the work place, jobs too have to be designed according to the needs of the age of employees (working time, career planning).

Corporate culture:

- corporate communication;
- corporate policy und mission statement.

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*Source: INQA, 2004.*

Internal review of existing measures and procedures within these fields of action showed that Siemens already cares for its employees in many ways. Of course there still is a lot more to do, especially in establishing effective health management. The Compass process was identified as one of the good examples to show that it is possible to improve the situation of white-collar workers with respect to qualification and job design.

### 2.3. Working conditions today

Working conditions today tend to be characterised by more psychological strain, stress and other consequences of psychological strain, work related illness, early retirement because of mental health problems and a heavy workload and 'aggregation' of work.

An empirical study in Germany showed that employees suffer more and more from bad labour conditions, especially from time pressure and excessive demands (Fuchs, 2006a, p. 13). For the works council, these results have to be taken seriously. Below are some key results of the study (Fuchs, 2006b):

Good working conditions from the point of view of employees means:

- (a) having a secure and dependable income;
- (b) being employed for an unlimited period;
- (c) having the opportunity to bring and develop professional and creative skills into daily work;
- (d) to be given credits and develop social connections and enriching human relations.

Employees look upon work favourably, if:

- (a) possibilities for personal development, qualification and having influence on the situation are considered helpful;
- (b) the relationship between colleagues and superiors is good.

Workplaces which fit these conditions are rare:

- (a) only 12 % of all employees have a workplace corresponding to these conditions;
- (b) 35 % of all workplaces are near to them;
- (c) 53 % of all workplaces are identified either with extremely low resources or with an alarmingly high level of wrong conditions.

These results show that in the eyes of employees a lot has to be done to improve working conditions. And, more important, they identify the fields of action from their point of view.

Another study in Germany recently asked the following question: ‘thinking about your work and your state of health: do you believe you can perform today’s work under the terms of today’s working conditions until you reach your retirement age?’ The results are shown in Table 2:1. It is astonishing that only 59 % of all employees answered ‘yes, probably’ and 24 % answered ‘no, probably not’. On the other hand, it is no surprise that there is a difference in the response given by older employees because they are nearer to retirement age (Conrads et al., 2005, p. 21).

*Table 2:1 Employees’ thoughts on being able to continue to work in current job until retirement, by age group (%)*

Employees’ responses	Age groups			Overall
	< 30 years	30 up to 50 years	50 years and older	
Yes, probably	53	59	66	59
No, probably not	29	24	18	24
I don’t know	19	16	15	17

Source:

Conrads et al., 2005, p. 21.

The younger the employees the more sceptical and uncertain they are. These results are alarming indicators, which show the need for taking action and measures to improve working conditions.

## 2.4. Good working conditions from the point of view of employees

'From the employees' perspective, a good job means a regular reliable income, permanent employment, the ability to use professional and creative skills in the job, recognition and social relations. A job is positively assessed when there are sufficient resources available, for instance, opportunities for development, qualification and influence, as well as a good social atmosphere among colleagues and superiors. A further important condition is that the level of requirements placed on the employee is not too strongly experienced as a strain' (Fuchs, 2006a, p. 9).

### 2.4.1. Experience and evaluation of the current working situation (Fuchs, 2006b)

Employees perceive disproportionate demands as potential threats:

- (a) physical work/exposure in the work environment;
- (b) complexity/responsibility;
- (c) conflicting demands/problems in communication;
- (d) problems with work organisation;
- (e) emotional strain;
- (f) social strain – leaders;
- (g) social strain – colleagues;
- (h) lack of influence/lack of occupational career;
- (i) precarious employment;
- (j) intensity/heavy workload;
- (k) extent and position of working time.

Potential resources are the following:

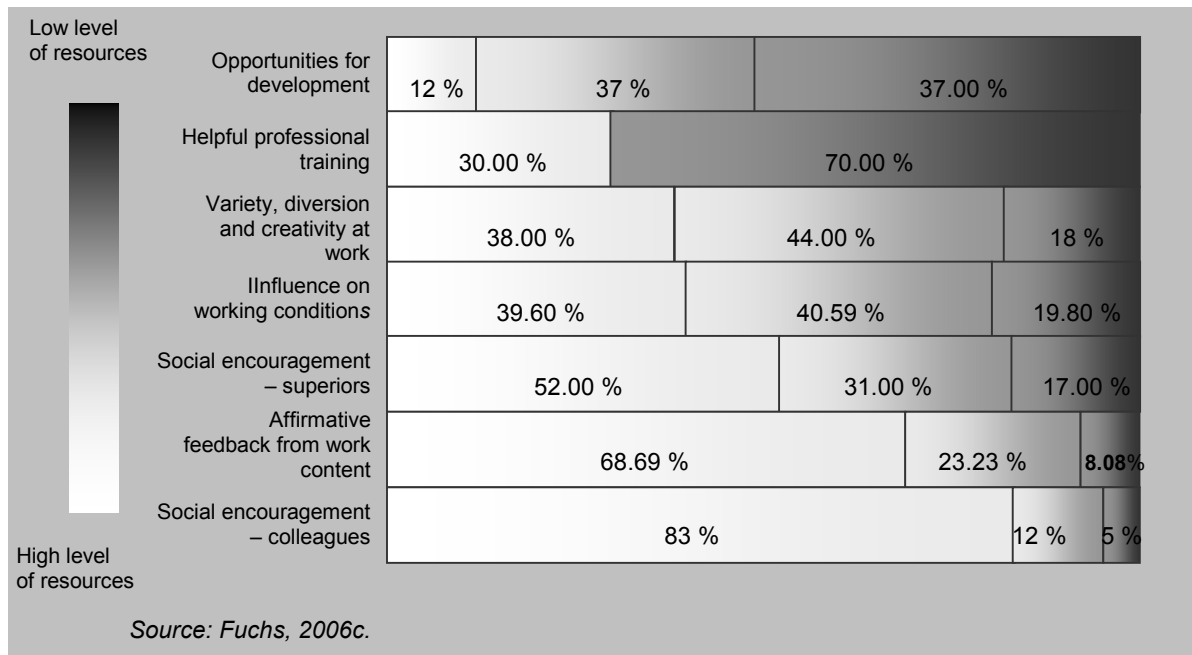
- (a) continuing education;
- (b) influence on working conditions;
- (c) possibility of occupational career;
- (d) variety, diversion and creativity at work;
- (e) flow of information/feedback;

(f) social encouragement – colleagues;

(g) social encouragement – superiors.

Figure 2:2 shows there is wide scope for improvement.

Figure 2:2 Resources and their use from the employees' perspective



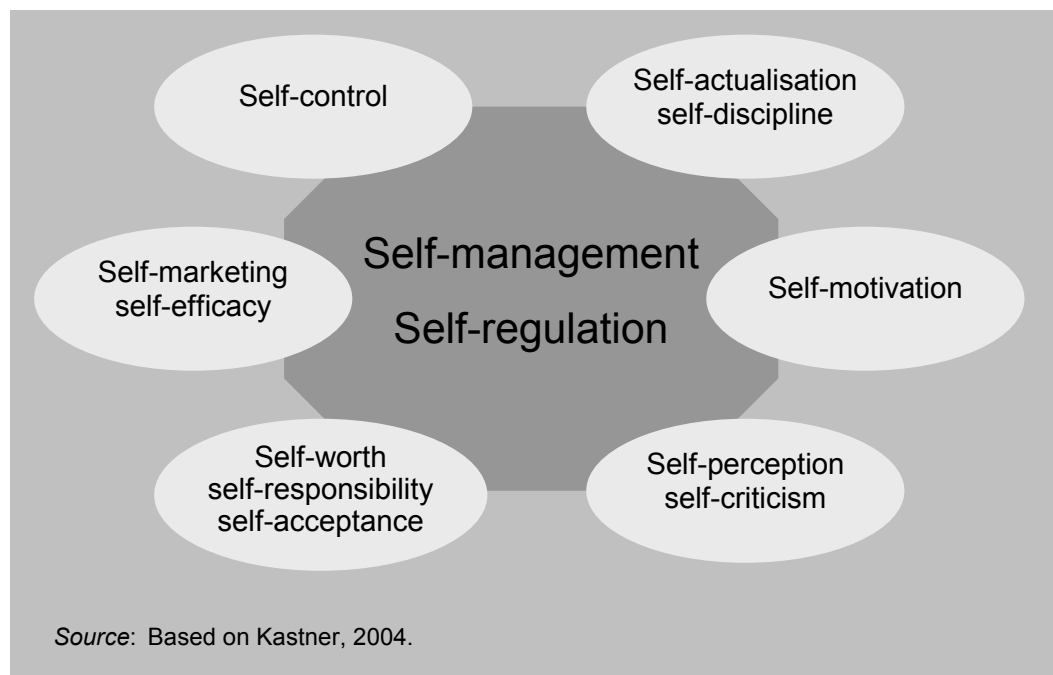
In the Compass process it is important to note that in the field 'opportunities for development' about 51 % of the employees do not see not enough assistance and possibilities, 37 % find some chances and only 12 % see enough opportunities. This area of action is the starting point of the Compass process. It is aimed at supporting employees in starting to develop their careers.

## 2.5. Towards better self-management: strengthening the individual, personal resources and self-efficacy

Against the background of demographic change, the Compass process at Siemens is one example of good practice which mainly aimed at fostering employees self-management and self-regulation (Figure 2:3)<sup>(3)</sup>. It is a measure that the works council supports and recommends because it focuses on individuals, strengthening their capability to manage their individual needs and values, occupational career and personal motivation.

<sup>(3)</sup> The figure shows desirable qualities of employees today. It is taken from Kastner, 2004.

Figure 2:3 Desirable qualities of employees



The Compass process contributes to a better work-life balance in view of a longer working life. It not only helps people find a job which fits their needs and capabilities, it also helps staying healthy facing a longer working life under complex and challenging working conditions.

## 2.6. The Compass process <sup>(4)</sup>

### 2.6.1. Organisational background

Siemens AG is one of Germany's leading technology companies. The company is economically successful in information and communications, automation and control, power, transportation, medical and lighting. The company employs a total of 460 800 people worldwide, 165 000 in Germany. Around 27 % (124 000) of worldwide employees are women. Siemens is a reputable employer that attracts qualified young professionals.

Siemens is active in training young people and staff competence development. More than 60 % of worldwide employees have vocational qualifications: 34 % (158 300) have a university degree; 26 % (117 000) of the workforce are engineers and scientists; 35 %

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<sup>(4)</sup> Section 2.6. is published with kind permission of the European Foundation for the Improvement of Living and Working Conditions. The original article (Eurofound, 2005) is based on an interview of Andreas Reichert, University of Dortmund, with Hans Heusgen and Wolfgang Mai.

(160 000) of the staff served an apprenticeship or completed vocational school. Just under a third (142 500) have an irrelevant or no vocational training at all.

Siemens is a German company of long-standing tradition with a high score of employee retention. Siemens relies on an excellent workforce and offers a wide range of possibilities for continuous individual development. Professional careers often start in the company and continue until retirement.

The age structure of Siemens AG is centred around the middle-age group. There are relatively few employees above 55 or 60. The average retirement age correspondingly lies between 57 and 60. At present many staff members still make use of partial retirement.

Siemens has a works council actively involved in personnel development processes.

### **2.6.2. Description of the original initiative**

The Compass process was primarily developed after an employee survey on job satisfaction in 1998. This survey helped sensitise the personnel department on the situation of employees aged above 40. Too often, this situation was characterised by a lack of orientation and perspective, resulting in demotivation.

The Compass process was introduced as a personnel development instrument. In the mid-1990s, staff in the research and development department were called on to look for research projects and funding within the company on their own initiative. Special introductory and support courses focusing on business economics and personality development for employees aged between 30 and 40 were to aid them. After an introductory phase of research and development, these younger employees were expected to move on to a job in the managing sector. Thus one hoped to avoid one-sided specialisation, allowing researchers to become acquainted with the operational business and clients.

Older staff members (aged above 40) of these departments were soon irritated that they were not offered comparable treatment by management. They often felt trapped in a career dead end, although they were highly qualified.

It also became apparent that company-wide personnel development had so far primarily focused on younger staff members. This feeling was backed up by a survey of 2 000 employees of the central department of research and development in Munich and Erlangen. It showed that the group aged over 40 in particular was very dissatisfied with its situation because it lacked development opportunities and insufficient attention was paid to individual capabilities.

This situation, which was also economically problematic for the company due to lack of motivation and suboptimal deployment of older employees, led to development of the Compass process in collaboration with the consulting firm Compass Team Consulting. A major objective of this personnel development measure was to motivate employees and

prepare them for continuing to work with dedication for 20 more years, as the enterprise was interested in benefiting from the resources of highly qualified and well-paid employees.

The target group of the Compass process was employees with several years professional experience, wanting to define their positions and accept new challenges. One of the main objectives of the Compass process was to make good use of the achievement potential of employees with the most experience and to achieve a high degree of agreement between the personal goals of employees and business objectives. In this process, the achievement potential of employees are the criterion for finding the ideal tasks and fields of activity. Central elements of this measure are longer-term monitoring and required employee commitment to formulated aims and arrangements. Both employees and personnel management are integrated into this process.

The programme comprises first a workshop for initial individual and professional orientation. After approximately four months, it is followed by a seminar that aims at reflecting and focusing the goals. The overall objective is to make employees the drivers of their own development, to let them ascertain their individual competence profiles and define the concrete implementation steps for their professional future and give them more responsibility for organising their work. The resulting goals/projects for each staff member range from individual competence development to undertaking new tasks in their previous fields of activity, or to a change of job in or outside the company, or even to changes in private life.

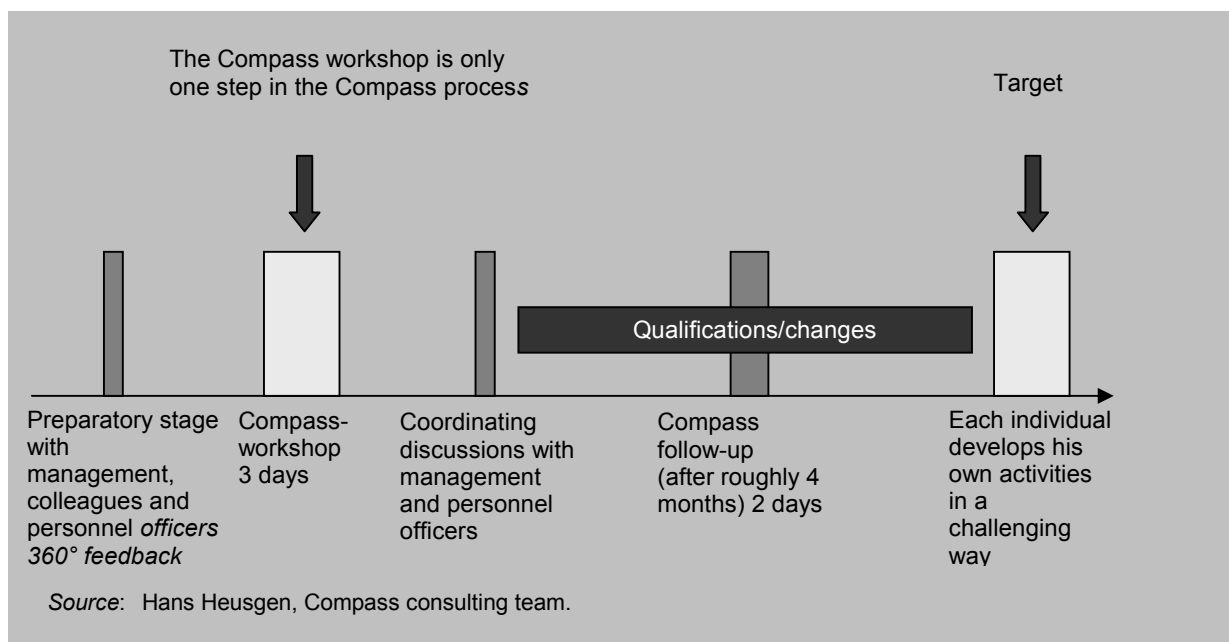
The modules of the Compass process are described in Table 2:2. The process begins with an introductory phase, in which participants reflect on their life and professional biography and obtain 360° feedback on personal strengths and weaknesses from colleagues, executives and clients. Then results are analysed during a three-day workshop. At the end of the course, each employee – supported by ideas, suggestions and feedback from other participants – formulates a personal development plan with concrete steps for action. Following the workshop, company-related projects are examined in coordination meetings with executives and personnel management to consider if they are practicable. The implementation strength relies on the fact that employees bear the responsibility for realising the agreed measures. As these goals are important to them personally, they will effectively pursue them. Further, a two-day follow-up seminar, after approximately four months, looks at the state of the project, problems and progress and, if necessary, further action alternatives can be developed.

Table 2:1: The Compass process

Phase	Goal	Contents/tasks
Preparatory phase	To reflect on life and professional biography	360° feedback from colleagues, executives and clients
Compass workshops	A concrete personal development plan	Situation analysis and career planning
Coordinating meetings and discussions	To discuss how realisable the personal development plan is	Analysis and discussion on the personal development plan
Two-day Compass follow-up seminar	Reflections on personal development plan implementation	Discussion and developing possible corrective measures

Source: Hans Heusgen, Compass Consulting Team.

Figure 2:4 The Compass process at a glance



Currently, the Compass process applies to all staff members of Siemens AG Germany aged above 40.

The Siemens internal further education provider, Learning Campus, provides the programme. To avoid age stigmatisation it is promoted as a measure for employees with several years of professional experience. Training takes place at seminar hotels during working time and all costs are borne by the company.

### 2.6.3. Further development of the initiative

Due to its success, Compass training was incorporated into the regular programme of the Siemens internal further education provider. In the meantime, approximately 8 to 11 workshops (at the beginning, in 1999, four workshops), with approximately 10 participants

respectively, take place every year. Especially executives take part in these workshops. However, although the primary target group of the Compass process is project managers and executives, employees without executive functions are also admitted.

While at the beginning only older employees from the central research and development department were targeted, the measure has since been extended to all staff members of Siemens AG Germany. Employees of Siemens AG can book the workshop Germany-wide via the central further education provider Learning Campus.

The high esteem in the Compass process shown by Siemens is seen by the fact that despite a reduction of seminar offers in general in the company, Compass workshops have not been curtailed.

Further, particularly conducive to the Compass process are internal possibilities for further development in a globally positioned enterprise. Thus, the company can often comply with the wishes of participants.

In the course of years, the workshop concept has been updated and further developed by the consulting firm Compass Team Consulting. Since last year, an experienced executive has been invited to the first module to give workshop participants feedback on their personal development plans in individual coaching sessions.

Compass trainers are licensed by the consulting firm Compass Team Consulting and audited by the further education provider at regular intervals.

So far, the following experience has been gained:

projects range from individual competence development up to venturing on self-employment. Feedback from participants is very positive. Employees are more motivated and in a few cases they have also reorientated themselves in the company. In a few isolated cases, employees have started their own businesses or taken up teaching at university;

another success is that former participants have formed groups by themselves to pursue ideas further, exchange experiences and profit from this network privately and professionally;

naturally, such a reorientation process also requires the support of executives. Often employees succeed in winning over their own managers for their own projects. Sometimes, however, support is insufficient. Experience has shown that it is helpful to integrate executives intensively in the implementation process. All in all, however, there has been no major conflict between employees, works council and management over the Compass process. Today the programme is generally accepted and implemented.

#### **2.6.4. Good practice today**

Since its start, the Compass process has been successfully implemented at Siemens AG. It has become an integral part of the further education programme of the central continuing education provider Learning Campus. Each year, this measure is offered up to 11 times. By means of defined standards a high standard of quality is consistently achieved. A comparable offer for under 40-year-olds is likewise being continued. Further, the consulting firm Compass Team Consulting has, in cooperation with Learning Campus, updated and certified the concept.

In addition, company management and the general works council have planned further projects. At some production plants special health protection measures have been implemented.

In future, the human resources strategy will more strongly concentrate on promoting horizontal careers. It is hoped that measures such as job rotation, respective to systematic job changes will keep employees motivated and free from health impairments for longer. Here too the objective is to assure a fit between individual and company interests.

To achieve this, a new form of management culture is needed. It is clear there must be a high fit between employees and their tasks, and their position. If not, employees will not achieve the desired job performance due to lack of motivation. Therefore, management must guide employees so they can position themselves in the company in such a way that both can profit.

### **2.7. Benefits of the Compass process in the face of demographic change**

For the works council, the Compass process helps the company to manage the challenges of demographic change by going beyond strengthening the coping strategies of employees. Box 2:2 highlights the benefits, albeit not exhaustively, of the Compass process as seen by the works council.

### Box 2.2: Benefits of the Compass process in the face of demographic change

- appreciation of older employees by encouraging them to take over self-responsibility;
- strengthening the capability of leading oneself;
- establishing of a motivating working situation;
- social added value by boosting the human capital and the hidden capabilities of the employees.

Innovative strategy of HRD:

- paying attention to self-respect and dignity of every employee;
- accepting participation of the employees in designing their career;
- contribution to maintaining employees' mental health;
- genuine motivation of employees by encouraging them to do what they really want;
- strengthening the willingness and capability to change;
- showing the opportunity for orientation in a permanent change of working conditions;
- initiating processes of change and establishing networking.

Finally, we wish to give the closing words to Bijan Amini, Professor of Educational Science at the University of Lüneburg:

'Aristotle said that man has to work to enjoy leisure. For him, the relation between work and leisure time was in good balance. Max Weber said, man has to recreate and recover, to be able to work again. In this case, too, symmetry between activity and regeneration is implied. Modern spirit has unbalanced this symmetry to one side. Either you have a highly specialised work or you have none. The more machines get sophisticated and elaborated, the more the specialised workers are being made redundant and out of work. Hence people of the modern spirit have no peace and quietness or too much of it. Either they are unemployed or they have too much work to do. Either they have a full schedule or they have none. Modern man has lost the necessary balance between work and leisure.

The problem is that today we have no chance of turning back. We only can watch that the train, in which we are all sitting, is constantly accelerating, because we ourselves have switched off the brakes. In this situation we cannot heal the world, no romantic turn-back to nature, no retrogressive longing for 'the good old times'. There is only one thing left to do: to boost the capabilities of the individual person to cope with this situation. We cannot change today's world; but we have the potential to change ourselves. And if everybody begins to change himself, maybe the world will move into another direction' (Amini, 2004, p. 14).

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# Chapter 3. Management of active ageing in businesses in France

*Bénédicte Gendron*

## Abstract

Many European countries started work on age management long ago. In France, several reports have confirmed the urgency and complexity of age management. Low participation of French older workers in the labour market has been the result of premature exclusion, in a context of high unemployment and industrial restructuring. Discrimination on access to jobs and training persists with older workers. Age management is not yet something from which enterprises can expect a return, because of the sociocultural negative perceptions and image of older workers. Nevertheless, some companies have started to implement innovative initiatives and test new solutions for promoting active ageing. This article presents some examples of those experiences. The main conclusion of the paper is that it is necessary to reconcile age, work and training to favour social links and better sharing between generations to promote ageing, living and working well together.

## 3.1. Introduction

Many European countries started work on age management long ago. In France, several reports confirmed the urgency and complexity of age management. Low participation of French older workers in the labour market was the result of premature exclusion, in a context of high unemployment and industrial restructuring. Discrimination on access to jobs and training persists with older workers. Employees over 45 are less concerned about the risk of unemployment than other employees, but they are much more affected by long-term unemployment. Among older workers, a strong culture of early retirement from the labour market also persists. Also, tackling management of age is not yet something from which enterprises can expect a return, which means they were hesitant to become involved because of the sociocultural perceptions and image of older workers. After the question of active senior citizens had been joked about for decades, the French government launched a national TV campaign promoting active ageing at the end of October 2006. Some firms with the support of some European Social Fund programmes (Racine, 2005) also came to realise the need to break from this early retirement culture, and tested new solutions for promoting active ageing: from including older workers to management of all ages promoting diversity. This paper explores actions and practices of some French businesses.

## 3.2. Modernising with older workers: France 3's experience

With 4 800 employees, the France 3 television station represents a large French public network in terms of staff members. Employees are journalists, administrators and technical

staff bringing together different occupations. France 3 has acknowledged the demographic framework and shifts recently, and launched a programme called *Moderniser avec les seniors* [Modernising with older workers].

This company has registered its policy intention of combating all forms of discrimination in its strategic plan. Therefore, older workers were included in the TV channel modernisation plan aimed at identifying conceptions of age and work and analysing the place of various generations in the enterprise to develop suitable strategies for action. It is worth incorporating this prior work into more comprehensive strategies for change: corporate plan, revitalisation of management of human resources, need to take a fresh look at production arrangements. This is what France 3 did. The working life plan and keeping workers in their fifties in the firm was one of their central focuses. The purpose was to promote employability and allow older workers to remain in the company until retirement age by energising the second part of workers' careers. The central questions were how to stimulate age management in a firm and what kind of tools could be developed.

### **3.2.1. Phase 1: a survey on older workers' perceptions and prospects**

The first step was to conduct, with a private human resource service, a study of employees over 50 years of age to investigate the way in which they perceive their situation and the prospects offered to them. The questionnaire yielded a high response rate. It turned out that people felt involved and wanted to give their opinions. Qualitative interviews were also conducted. It emerged that people over 50 consider themselves in a critical phase: their past is scarcely considered and not valued much. The people polled described in detail their feelings of being rejected. After a period of frequent promotions, the company no longer offers prospects other than stagnation. The key words used were 'fatigue', 'weariness' and 'end of growth'. The study referred to three attitudes adopted by employees: (i) some choose preservation, maintaining their image for themselves and others by adopting different strategies; (ii) others opt for withdrawal, distancing themselves with regard to the company and investing their energies elsewhere; (iii) the largest number, however, choose to leave the company.

### **3.2.2. Phase 2: development of an action plan 'older workers in companies'**

Faced with these findings, France 3 developed the second step of an action plan for 'older workers in companies' (*dans les entreprises les seniors*). The purpose was to allow them to experience the lengthening of working life under the best conditions possible. And beyond the problematic issues of older workers, France 3 tried to think of comprehensive solutions for all age groups. It wanted to ask itself more generally about the method of career management for the whole staff. Two actions were thus put in place, targeted at people in their fifties but also involving younger people: orient the employees, through the *rendezvous mi-carrière* (mid-career meetings) and develop new roles in the company.

### **3.2.3. Phase 3: implementing a new mid-career meetings tool and opening new roles for older workers**

First of all, France 3 developed a tool for orientation and positioning intended for employees between 40 and 45, who are halfway through their careers. This approach was basically preventive. It aimed to set up dynamic, open prospects and allow these employees to develop a real career plan so they did not feel they were facing a ceiling or professional impasse. This tool took the form of group meetings, where employees expressed their hopes and shared their objectives and expectations. Second, the company allowed employees, in particular those in their fifties, to develop new roles. The intention was not to replace the functions occupied by employees, but to permit them to take on new roles based on their experience. Their expertise was then put to use in the role of trainer or mentor. It involved developing a path, sometimes in parallel to a traditional work activity, by adding a new role that considered the distinctive characteristics of employees. If this experience did not address itself specifically at a population of workers over 50, none the less, people who felt they were at the end of their careers became aware the company was investing in their prospects. For France 3, the response to the withdrawal of the oldest employees applied to all age groups. They thought it would have been a mistake to handle the issue of seniors as though it related only to them, by using methods applying only to this age group. This attitude would have reinforced the isolation of older workers and contributed to their stigmatisation. On the contrary, for France 3, recreating dynamic energy is necessary, as far upstream as possible.

### **3.3. Managing knowledge and competence transmission: Lionet Décor *atout age* (age asset)**

Revitalising training arrangements and knowledge transmission was the orientation taken by Pierre Lionet, Director of Lionet Décor, a medium-sized enterprise (ANACT, 2006, p.7). His company employs 50 people in different trades (painters, plasterers, carpet layers, people who install roller blinds, curtains, ceilings, salespeople, and administrative staff). Of the company's clientele, 70 % are private individuals, accustomed to very high quality. Lionet is concerned about people retiring because one quarter of its employees are over 50. For him, they have expertise in the trade and both upstream and downstream knowledge. But, this population is also versatile. To alleviate this problem, his company set up the age asset project (*Atout'Age*), which aimed to maintain the company's competence while integrating new employees.

#### **3.3.1. Training tutors to help establish a learning plan for intergenerational competence transfer**

Three tutors went on a training course and were able to assess their occupational skills. They then transmitted this know-how and helped those being tutored in their relationships

with the people around them. In such a programme, communication was indispensable for setting the conditions for transferring competences. The tutors, those being tutored and the director, devoted time to implementing this form of communication. They incorporated the tutoring schedule into their respective timetables. In this way the tutor was able to execute a chronological learning plan. Management was committed to a competence management approach and integrated the necessity for intergenerational sharing of know-how into its decisions.

### **3.3.2. Identifying competences to create occupational reference guides and internal training**

This experiment turned out to be satisfying and was closely followed by the company's staff. It seems that the role of the head of the company in introducing such an approach was essential. Everyone was conscious of the loss brought about by the departure of older workers and the necessity of transferring competences to the youngest workers. In this experience, young workers were very motivated. Equipped with mobile telephones, they were able to call the tutors as soon as a problem arose at the work site. The tutors were able to support the workers on site the next day. A trusting relationship was established. In addition, the company recruited an engineering student (at master degree level) in an end-of-studies internship agreement to identifying competences in all the trades in the company. Her presence for two days a week helped the project stay on course. She made the link between all the trades in the company. This preparatory work helped the company to create reference guides for each occupation and extend the internal training with tutors. On several work sites, the company was able to develop tutoring worksheets, on which each person could add their comments. The transfer of competences was considered a priority for maintaining the quality of the company services for their customers and for the company's survival.

### **3.4. Promoting knowledge diversity and sharing knowledge: Cedilac's experience of *former à tous les âges* (training at all ages) (Abattu et Lamotte, 2005)**

Cedilac is a factory which belongs to an important milk companies' group. At the industrial site of Cedilac, in Vienne (Isère, FR), the factory Cedilac, specialised in ultra-temperature sterilisation unit (UHT) milk manufacturing, employs over 200 people. Almost half are over 45 years old. To strengthen the links between generations in work teams, 'a new pact between the generations' could be implemented; to ensure that skills are complementary, young people are integrated, older workers are kept and career mobility is increased. Especially, in a tight labour market the intergenerational bond must be maintained with concrete tools. Bonds are thus created in both directions, bringing about a flourishing intergenerational dynamic: older people transmit and young people learn. Experienced

employees also continue to learn, while the youngest people are not completely devoid of experience.

#### **3.4.1. Training at all ages, a project to promote intergenerational knowledge and skills transfer**

Cedilac employees are older and the company is having trouble recruiting for key occupations (manufacturing, packaging, maintenance). Although the age of supervisors is around 35, the majority of team members are over 45. For Marie-Antoinette Blondin, Head of Human Resources at Cedilac, these experienced employees know a great deal and must share their knowledge (Racine, 2005). Therefore, she launched a project named 'training at all ages' (Blondin, 2005). Older workers would transmit their experiential knowledge to youngsters, and the young would give their elders the benefit of their skills in other areas, such as information technology.

#### **3.4.2. A reference tool: diagnostic sheets to document oral knowledge and communication**

Because the operators had lost a vision of the whole of the system, and good practices were not being transmitted, a reference tool was necessary. The idea was to manage better career paths and teach the people with the know-how ways to formalise it. This entailed bringing people working in the workshops together and asking them to do a breakdown. This required employees to conceptualise, look at details of the chain of events and the problems that cropped up as well as actions that were inappropriate, risky or inadvisable for reasons of effectiveness or organisation. Fifteen people who repair installations downstream followed very concrete training courses that yielded good results and helped develop tools.

#### **3.4.3. Outcome: a useful database for problem solving and search for good methods**

First, to capitalise on knowledge, computerised diagnostic sheets were created. They now constitute a database for searching for good methods for solving breakdowns. The diagnostic sheets led to more mixed results. This is in fact an ongoing tool: a person on permanent assignment is required to update the data. Feedback and formalisation sessions are necessary, as well as a dedicated coach. But for workers, accessing the sheets is not yet a natural reflex. Second, the company was able to formalise numerous actions previously done orally. Thus the sheets for inspecting machines allow an amateur operator to perform checks on the machine with complete peace of mind. They will be updated in future, as they have been unanimously recognised as useful.

Through this experience, knowledge management and making effective use of experience was the focus for businesses to survive and prosper. This experience and knowledge of

older workers and its transfer challenge the assumptions underlying the accepted way of doing things: best practices.

### 3.5. Conclusion: generations ageing, living and working well together

France has been characterised by focusing on early retirement of its older workers. But it cannot any longer sustain a systematic policy of rejecting ageing workers. This policy has led gradually to recognition that early retirement was merely an easy way out of the problem that has many substantial adverse effects on the economic, political, and social spheres. Also, this policy of early exit has been criticised for its cost for years. Thus the decision to review this policy is not surprising. Even though this policy field is particularly deeply institutionalised, policy-makers are nowadays opting for a path through incremental changes. As the government has been involved in a voluntary reform policy aimed at helping people over 50 return to work, older workers' working and retiring conditions have to be improved.

A new consensus on age management has to be implemented promoting links between the generations: ageing, living and working well together. It must set up concrete measures to assist and stimulate the necessary changes of attitude.

#### **3.5.1. Change of attitudes and awareness-raising in human resources management**

The image of older workers held by businesses and employees and by public opinion must be modified. The sociocultural perceptions of older workers must change and in the workplace, stereotypes should be eliminated. Business managers and the people involved in counselling, training and employment may not necessarily have the means to tackle these new challenges. Human resources managers are starting to become familiar with the concepts, methods and tools needed for providing suitable answers. However, only a few large enterprises seem to have acquired a certain amount of experience in this area. Therefore, the widely-held prejudices relating to older workers should be challenged. There is also a call to business sectors and local authorities to become involved in an awareness-raising exercise directed at heads of companies, executives, employees and their representatives and in small and medium enterprises as well.

#### **3.5.2. Proactive policy towards secure, attractive and flexible late career paths**

Also, to make career paths more secure, adjustment initiatives for retirees could be made more attractive. The aim is to put in place ways of anticipating the conditions for the retention and career development of workers aged 45 and over. Implementation of an appropriate policy for keeping or re-employing older workers implies action in different directions: change in employment practices and behaviours; emphasis on job placement; expansion of sources

of employment; targeted, motivating training in an individualised programme; and local management based on partnership. A proactive policy must guide the public authorities, enterprises, unions and workers.

### **3.5.3. Age diverse work teams and 'learning to learn' at any age**

Transnational cooperation has made a major contribution to promoting strategies of diversity. All concerned parties have come to realise the value of promoting age-diverse work teams and social cohesion. Age management in a life-course perspective also provides an opportunity to take a completely fresh look at training mechanisms and systems. The goal should be to develop more effective 'learning to learn at any age' so that the skills acquired throughout life are being put to use in work teams.

### **3.5.4. Age management challenging human resources practices**

The 2004 French law of social modernisation promoted lifelong learning (LLL) and the accreditation of experience scheme. Beyond that, there is a need to focus on the establishment of systems of cross-transfer of skills. This is a way to completely revitalise the practices of tutorship and mentoring. It also implies that human resource departments have to refresh the way they manage their workforce. The management of all ages question existing practices. It thus can lead to improving human resources strategies, involving the reformulation of practices of forward management and renewal of all systems, all resources and all existing tools. For instance, human resources departments will have to care about wellbeing, health and work conditions of their workers to set up sustainable and high quality age management. The success of such action will rest on a solid partnership connecting people regardless of their age and position. Indeed, this pact and those new conditions of intergenerational work, will help transfer the knowledge between older and younger workers, at easing exchanges between peers and contribute to knowledge management (Gendron, 2004).

### **3.5.5. Broad partnerships for intergenerational solidarity and learning**

Policy-makers, local authorities, social partners and businesses have to anticipate developments in age more effectively and promote new solidarity between the generations. It is necessary to allow both older workers and young employees to develop all the growth potential they have. All the resources available must be mobilised to put this strategy into practice. Like a better balance between the generations, transitions between different ages also have to be managed better. Good practices in enterprises seem to be based on a specific diagnosis and a due tailored action plan, comprising a battery of tools and mechanisms that are often combined to meet the requests of employees and enterprises (improving working conditions, establishing a collective framework negotiated with employees' representatives, partial and progressive retirement schemes).

To conclude, in a European comparison, France still appears as one of the bad pupils in the EU and seems to be late in its policy towards older workers. EU involvement may become a resource for French policy-makers, validating the legitimacy of the policy change. Exchange of information and the resource of European good practices may also suggest policy options and new orientations to stop the vicious circle of early exit.

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# Chapter 4. On-the-job learning in teams of mixed ages

*Jürgen Wilke*

## Abstract

In the pilot study presented here, work-integrated learning methods were put to the test in teams of mixed ages. This chapter is organised in four main parts. The first introduces the pedagogic framework, which the case study is based on and which is particularly suitable for older learners in the context of work. The second part presents experiences from two case studies carried out in enterprises in industry. The third part highlights the success factors for implementing the learning concept. The chapter closes with an outline of the model of learning for older workers applied in the case studies.

## 4.1. Introducing a pedagogic framework favourable to older employees' learning

Two major societal trends emerged since the end of the 1980s and form the background of the study:

- (a) the demographic structural change, leading to ageing of European society;
- (b) the economic-structural change towards increasing globalisation and dynamic innovation.

In view of this background, a series of pilot studies were initiated at the beginning of the 1990s, entitled <sup>(1)</sup> *Fit for the job: not a question of age!* The aim of these studies was to develop concepts for activities giving content and meaning to lifelong learning (LLL).

This section identifies some issues which seem to be particularly important for older people learning at work. These provide the premises for our model of desirable pedagogic arrangements for older workers' learning at work in teams.

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<sup>(1)</sup> Pilot studies are used by the German Federal Institute for Vocational Education (BIBB) to test new concepts of vocational education. The individual pilot studies are conducted by business enterprises and assisted by one research organisation each. BIBB provides technical assistance for the pilot studies. They are financially supported by funds from the Federal Ministry of Education, Science, Research and Technology (BMBF) of the Federal Republic of Germany and some of them additionally by funds from the federal states in which the pilot studies are conducted.

#### **4.1.1. Combining work, change and learning**

Certain conditions are necessary to obtain the best possible learning results:

- (a) the meaning of learning contents should be transparent;
- (b) there should be a strong relation with one's own practical situation;
- (c) it should be possible to choose individual learning paths;
- (d) it should be possible to choose individual learning speed.

The approach adopted in the pilot study fulfils these requirements and can be characterised as 'work-oriented learning combined with designing one's own job'. There are no tests or marks in such learning processes. Coping with one's job in a better way is proof that the sessions have actually resulted in new competences.

#### **4.1.2. Voluntary participation and individualisation**

The factors which boost voluntary participation are: meaningfulness of learning, relating learning to one's own job, and focusing on learning benefits. Employees may also be allowed to participate first for a trial period and only afterwards decide whether they wish to continue or not.

Since working through a curriculum in a predefined timeframe is not an issue, each subject is discussed until all employees agree that the topic has been fully addressed and that they can move on to the next topic. Employees discuss the situation to be changed (through the learning process) and suggestions for change until everybody has understood what it is about and where to go. With respect to the processes of understanding and learning, everybody is really picked up from where they are and taken along.

The team also agrees on who is going to acquire which competences. It is not necessary that everybody learns everything. In this way, there is space for personal preferences and for contributing existing competences acquired in other settings and not used in the team.

#### **4.1.3. Benefiting from the age structure in the enterprise**

In the course of implementation, the moderators repeatedly asked if certain age groups and experiential background represented in the team could make a special contribution: is the issue to be solved by long experience? Is it about historically evolved terms or procedures, the conditions of which have ceased to exist in the course of the company history? Are there any previous approaches for a solution? Is it about current technologies which all young employees bring along?

It is useful to ask if it is possible to benefit specifically from the particular age structure in the company and if certain disadvantages should be avoided.

## 4.2. The pilot study: organisational and human resources development with employees in the second half of their working lives

In this pilot study, which was scientifically supported by the Fraunhofer Institute for Industrial Engineering, concepts for learning enterprises were developed which especially include older employees. The focus is on designing and testing methods as elements of organisational and human resource development (HRD) concepts. The goal is that these methods be especially suitable for strengthening the role of older employees in teams of mixed age. Exchange of knowledge between younger and older employees is also encouraged. The objectives of the pilot study are briefly described in Box 4:1. A more thorough account of the approach is available in the article by Wilke and Schätzler (2002).

### *Box 4:1 Specific objectives of the pilot study*

- implementing permanent job-oriented qualification activities addressing especially older employees;
- systematically adopting the contributions of older employees to enhance the enterprises' ability to respond;
- establishing self-organised, group-oriented learning arrangements;
- testing ways of reciprocal qualification of older and younger employees;
- encouraging structures at work which are especially suitable for benefiting from the experience of older employees;
- promoting older employees' readiness and ability to learn.

An education service provider <sup>(2)</sup> helped realise these objectives in five medium-sized enterprises and one employment promotion enterprise in the area of Villingen-Schwenningen, Germany.

In the course of the pilot study, a total of 54 case studies <sup>(3)</sup> were analysed. Each case study represents a practically tested approach for realising innovative organisational structures with older employees. The rest of this chapter presents two of these case studies more closely.

### **4.2.1. Case study 1: Walter Steinbach GmbH & Co. KG**

#### *4.2.1.1. Introduction to the company, pilot groups and objectives*

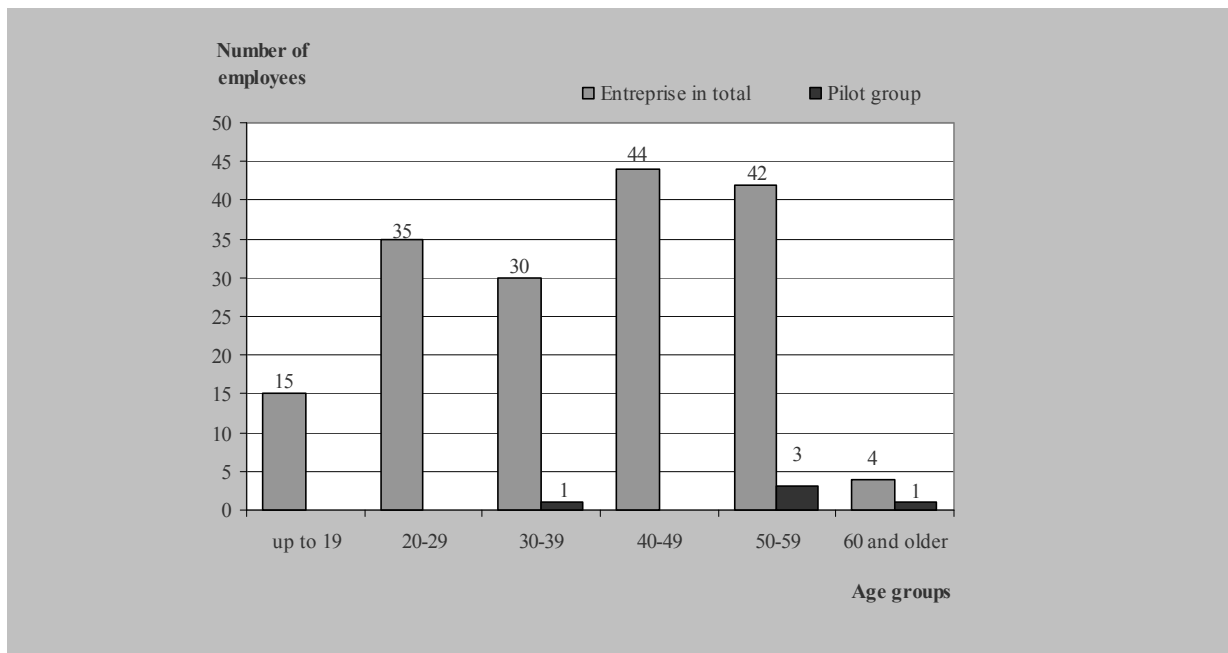
The Steinbach company is active in apparatus engineering, toolmaking and precision engineering. The company has a workforce of about 140. In the pilot study, the age structure (Figure 4:1) of the workforce was analysed for the first time.

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<sup>(2)</sup> Winkler–Ausbildungs-GmbH in Villingen-Schwenningen, Germany.

<sup>(3)</sup> Some of them by re-analysing the previously conducted pilot study: 'Self-organised continuing training in small and medium-sized enterprises'.

Figure 4:1 Age structure of the employees in the Steinbach company.



In the Steinbach company, there were two successive pilot groups composed of various employees from different departments. The first pilot group was composed of four employees who were fitters and warehousemen, aged 29, 51, 53 and 57 years old. The second group initially comprised six employees from the trimming and laser-cutting/stamping shop with an age range between 21 and 45.

#### 4.2.1.2. Framework conditions

Management's engagement and good communication: management's motivation for participating in this pilot study originated from increased interest in restructuring the organisation of work towards teamwork. Improved communication in the involved departments was required to cope more quickly and efficiently with any problems.

Practical relevance of the learning contents to one's own work: it was an important criterion that the issues to be dealt with in the pilot groups should be relevant to the actual work and the results should be fed back directly into the work. In this way, employees recognised the relevance of the pilot study for their own jobs. This approach also contributed to their motivation to address more and more complex job-related issues by solving problems efficiently.

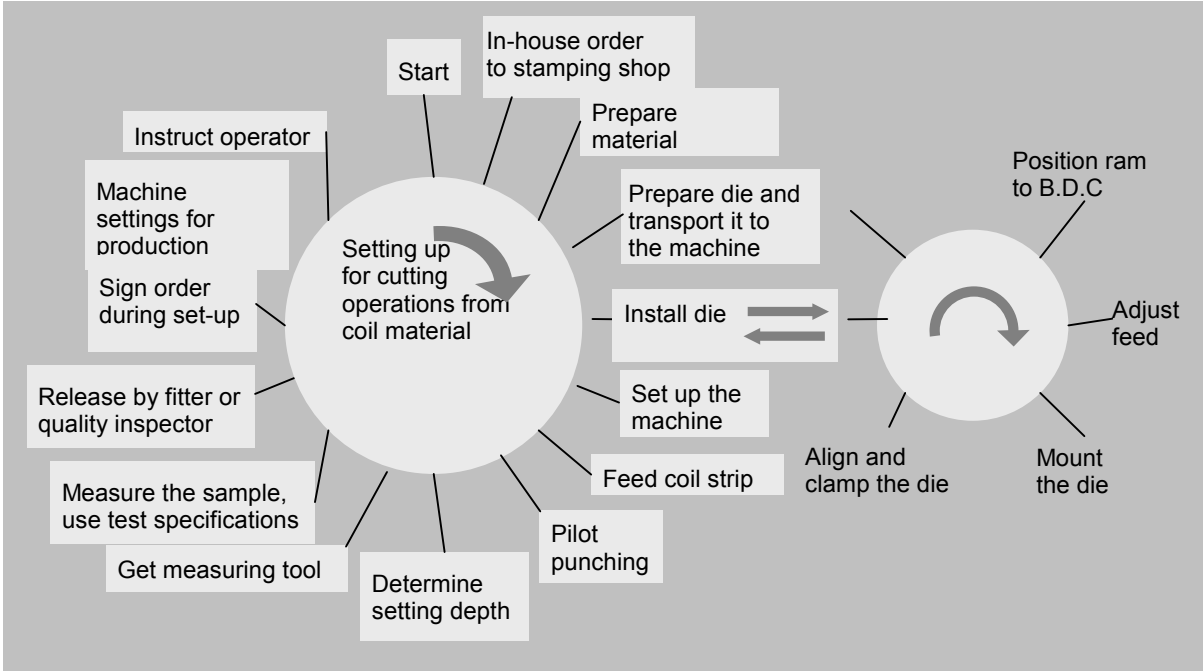
Older workers' experiential knowledge as an asset: older employees played a prominent role by contributing through their long experience to development of potential solutions. As a first step, the team chose the setup process as the subject of analysis, since some team members intuitively considered this process as significantly problematic.

Broad learning benefits: both the whole group and the company were to benefit from older employees' specific experience and knowledge acquired and refined in the course of many years. This was intended to change their role and provide new experience and insights.

4.2.1.3. Procedure

Visualisation and illustration of a holistic work process: the first one-hour session was the kick-off and first work session at the same time. Members of management attended it throughout. The session started with a short presentation of the pilot study and objectives for work with the pilot group. After the presentation, the pilot group selected a typical task of fitters in the stamping shop. This needed to be a frequent task comprising all set-up steps but nevertheless be as simple as possible. The group decided to analyse 'setting up for cutting operations from coil material'. This working process was represented by 'system circles' visualising sequences that depend on one another with regard to timing. The external moderator asked for the starting point of the work, subsequent partial activities and completion of a job. Individual partial activities of 'setting up for cutting operations from coil material' were written on individual cards fixed on a board. After corrections and additions, the result was a cyclic structure for the process of 'setting up for cutting operations from coil material' shown in Figure 4:2.

Figure 4:2 Set-up workflow for cutting operations from coil material



4.2.1.4. Results

Recognition of the experience of older colleagues: the group structured and visualised the set-up process jointly according to partial activities. Members of the pilot group – fitters and

warehousemen aged 29, 51, 53 and 57 years – were all able to contribute with their own experience. Older colleagues, especially, emphasised specific issues in the group meeting.

Motivation and support from management: work in the first session made it clear to the pilot group and management that the expected activities address the actual work. This created a good motivational basis particularly for older employees.

Methodical competence was acquired along the way: participants were shown how to use the card technique and its special advantages:

- (a) you can create images of invisible processes;
- (b) flexible rearrangement and modification is easy;
- (c) the image created is visible to all group members at the same time;
- (d) the final image is obtained only with the consent of all group members.

#### *4.2.1.5. Conclusions from the case study*

Accumulated long experience-based knowledge can be applied: when representing the working process of stamping, older employees had a particularly active role because of their experience. They were able to contribute to the description of the process with their knowledge, acquired during many years of working on the machine. In this way, some aspects of the process came to light as well as their historic reasons, which younger employees would not have been able to understand without information from their older colleagues. The hierarchical structure of visualised working processes reflects older employees' mental model as experts for the job developed over many years. This mental model of the task structure became an adequate basis for further work of the pilot group and their communication about work.

Motivation by management: since members of management were present, the knowledge of older employees met with acceptance and esteem. At the same time, benefits from work in the pilot group became evident when analysing work and a motivational basis for further work was created.

Methodical 'fringe benefits': the direct and target-oriented structuring activity with the card technique provided older employees with a new method of making their individual accumulated knowledge available to everybody. As a side effect, they extended their methodical competence and they recognised the purpose and benefit of this method, which was new to most of them.

## 4.2.2. Case study 2: Ruch Novaplast GmbH & Co. KG

### 4.2.2.1. Introduction to the company and the objectives of the case study

This company employed 150 employees in three shift operations in 2002. It is based near Offenburg in Baden-Württemberg, Germany, and manufactures formed parts made of plastic foam material, predominantly polystyrene.

The objective of the pilot group was to carry out small maintenance and repairs itself in the future. The intention was that employees would become qualified for individual tasks with the assistance of suitable in-house experts. In this case, in-house experts were older employees able to pass on their knowledge to younger colleagues.

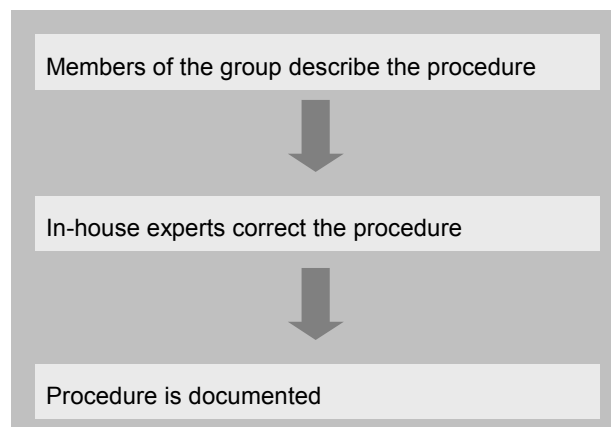
### 4.2.2.2. Procedure

Group members started by listing the activities on the machines necessary for keeping production running. They distinguished:

- (a) activities they could already carry out themselves;
- (b) activities for the completion of which they required support from the fitters' shop.

The objective was that older and experienced employees – as in-house experts – should qualify younger and less experienced ones for the latter activities in a community of practice. In addition, it would be possible to make corrections to the production flow if all employees considered this useful. The process is illustrated in Figure 4:3.

Figure 4:3 Learning from older and experienced employees as in-house experts



Documentation of maintenance and repair activities is intended to safeguard a uniform approach and provide a reference for activities that had not yet been carried out by the group or had been carried out a long time ago. The pilot group decided on illustrating the procedures with pictures and short descriptions rather than only textual documentation.

#### 4.2.2.3. *Results*

All activities to be completed during production were documented by employees so reproducible knowledge was created. With additional support from 'experts' in individual activities, group members were soon able to carry out minor maintenance and repair jobs independently.

#### 4.2.2.4. *Conclusions from the case study*

Older and experienced employees played a particularly important role since they acted as in-house 'experts' to qualify and assist younger and usually less experienced employees. As a result of their long-term employment, they had acquired comprehensive knowledge and had strategies and options for problem solving at hand from which their younger colleagues could benefit. Less experienced employees could learn how to approach a problem analytically and transfer the solutions to new challenges. Older employees were supported in reconsidering long-standing processes and encouraged to initiate improvements. In this way, constructive inter-age collaboration between colleagues was intensified and the basis for future cooperation improved.

### 4.3. Highlighting success factors

#### 4.3.1. **Focus on learning benefits**

All those involved need a motive if they are expected to make an effort to reach a goal. Hence, all those involved must be able realistically to expect a positive result for themselves through their efforts. They are not only participating individuals, but also the team and the organisation as a whole.

##### 4.3.1.1. *Benefit for individual employees*

All employees involved should be able to expect a benefit for themselves as a result of their activities. This relates to the principle of willingness. Willingness also helps reach indirect objectives such as 'solidarity among colleagues'.

##### 4.3.1.2. *Benefit for the team*

Benefit for the team can only be recognised if specific team-related criteria exist. These criteria do not necessarily have to be economic parameters. They may include, for example, that a team documents its knowledge base. This is an asset of the 'community of practice' rather than individuals.

#### 4.3.1.3. *Benefit for the enterprise*

The benefit for the enterprise as a whole can also be determined by specific criteria. In addition to monetary parameters, this includes, for example, the company image, customer satisfaction, employee satisfaction, etc.

Some other important favourable organisational and infrastructural conditions which a company can provide to a work-based learning process are summarised in Box 4:2.

#### *Box 4:2 Favourable organisational and infrastructural conditions*

Organisation conditions:

- presence of management at kick-off: expression of backing and support for the project work;
- project time is working time: expresses project work is as important as other work;
- absence of management during group meetings: promotes development of self-organised improvements;
- minutes from external consultants within short time: documented results of work for all those involved;
- regular fixed schedule for meetings: expression of the importance of meetings.

Infrastructural requirements:

- a room suitable for a team meeting every two weeks;
- a flip-chart to present statements to everybody;
- a pin board with a suitable presentation toolbox;
- a project folder for collecting all documents for the team;
- a digital camera to provide easy to handle authentic documents.

It is useful if large documents produced in sessions (flip chart notes, posters) which contain the results for all team members can remain posted in the room used for the meetings. If the room is also used by other employees, this offers the additional advantage that other colleagues can also see the results of the work. This creates an opportunity for internal communication and is also an invitation to communication because the results of the work are not concealed but intended as information for everybody.

## 4.4. The learning model behind the case studies

Learning in job-related projects represents situated learning (Lave and Wenger, 1991) and cooperative design of one's own system of work. Box 4:3 presents some strengths of this learning approach in work with focus on older workers.

#### Box 4.3 Strengths of the situated learning approach for older workers

- *Meaning making*: combines learning and designing and establishes a relationship with meaning which is especially a precondition for learning activities of older people. They want to know what they are learning for more than young people.
- *Self-motivation, assessment of benefits*: promotes choosing projects oneself by means of legitimating personal benefits while simultaneously considering team and organisational benefits.
- *Metacognition*: learning in this way helps to develop the ability of assessing one's own knowledge and competences. Talking about everyday work in a team leads to naming steps of working processes that usually go without saying. In this way a lot of clear information is offered especially by older workers to inexperienced younger colleagues. Older workers start to reflect on what has changed and which knowledge is still needed today or without any value. The latest technological or organisational developments appear and might stimulate further learning efforts.
- *Learning paths, acquisition of knowledge*: requires looking for sources of information. Older workers are often not used to learning because of missing learning activities over a long period. They renew their interest and capability in acquiring knowledge.
- *Criteria, factual focus*: requires making decisions regularly. This point refers to changed working conditions which older workers are not as used to as younger people entering an enterprise. Future work will increasingly require cooperative decision-making on a factual basis.
- *Individualisation, flexibility of roles*: at the same time, it allows for individually different participation options.
- *Designing cooperation*: it leads to interdepartmental cooperation and partly requires breaking down old barriers between departments. It is necessary to redefine established personal roles.

The range of tasks of team members changes incidentally by participation in such projects. This is particularly conducive to improving learning efficiency.

Learning within the framework of job-related projects is situated learning in and for communities of practice. For instance, many competences have a value only within the enterprise or team in which they were acquired and cannot be transported to other areas or enterprises without a loss (Lave and Wenger, 1991). In-house processes often contain elements which can only be understood and used in the context of their historic evolution. However, improved analytic competence and the problem-solving competence of employees who participated in job-related projects can indeed be transported to other areas.

Learning in job-related projects has a cooperative nature and pursuit of a common objective is the governing factor. A common objective cannot be achieved by one person alone. It requires cooperating with other persons involved in achieving the objective. This interaction has a cooperative rather than a competitive nature. Achieving the objective and the learning process are intrinsically tied to each other.

Learning in job-related projects also has an individual nature. There are no identical subject-matters of learning for different persons, since they carry out different tasks and

make different contributions to achieve the objective. Individual contributions result from the position a person is ascribed by other members of their community of practice.

The aim of learning processes within the framework of job-related projects is twofold. The goal is to maintain the community of practice through continuity as well as further its development by ruptures (Wehner et al., 1996). Continuity and preservation of the community of practice are achieved by passing on experience and knowledge to new employees. However, since new employees also bring new perspectives, objectives and activity performance that differ from the community of practice, ruptures occur which prevent identical reproduction of the community of practice. This results in innovative cycles in which clashes of interest are negotiated and communities of practice undergo change.

New communities of practice emerge from job-related projects, for example, by forming new groups for thematic reasons. Communities of practice may also change, for example, when teams are given more freedom of decision. Previous communities of practice may not have traditional patterns of action for new situations. In this case, cooperative learning within and among communities of practice becomes necessary since employees from other areas of an enterprise are involved. In a community of practice, other individual characteristics of employees come into their own. A new pattern of coordination evolves between communities of practice. The traditional practice is challenged in all communities of practice affected by the change.

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## Part II

# Learning innovations in the public sector

# Chapter 5. The NOSTE programme promoting lifelong learning for low-educated older workers in Finland

*Kirsti Hulkari and Susanna Paloniemi*

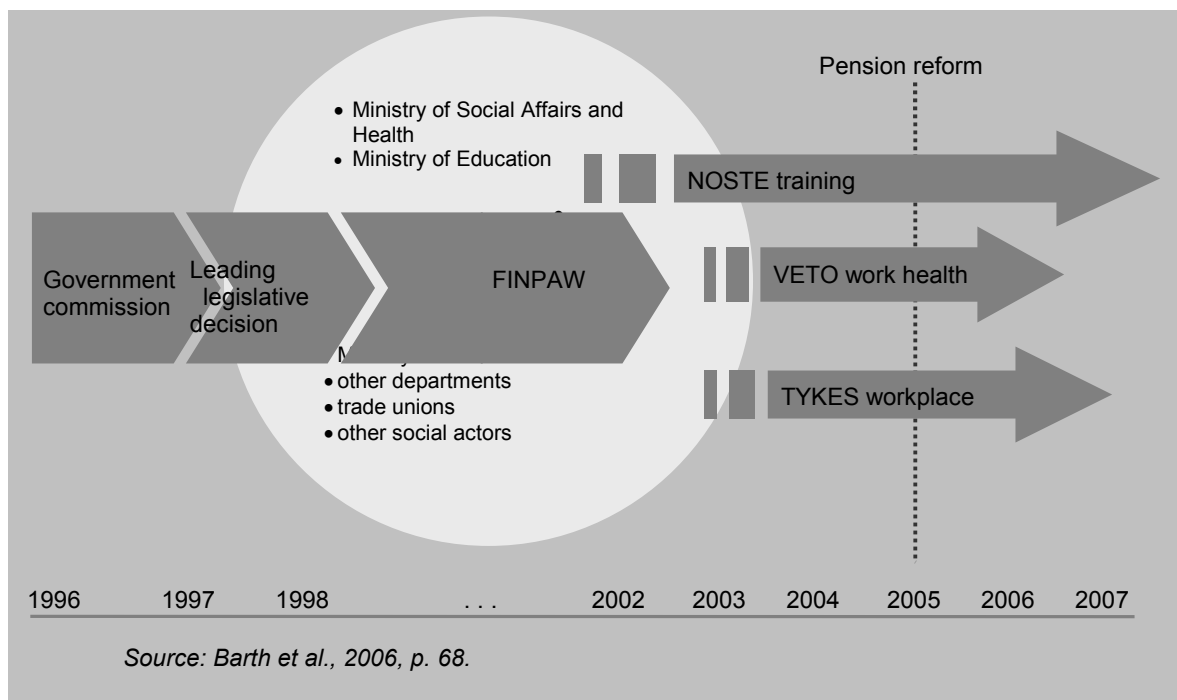
## Abstract

During the past 10 years Finland has been active in developing policies and preventive practices to counter ageing of the workforce at national, regional and local levels. The aim of the Finnish reform policy, *ageing workers*, has been to strengthen the possibilities for sustained participation in working life and improve wellbeing at work. Numerous national programmes have been launched since 2002. This article draws attention to the NOSTE programme, which aims at raising the level of education and training of adults. The programme is targeted at adults who lack basic vocational qualifications. Thus, it is very important for promoting lifelong learning among older workers. This article describes the background, content and actions implemented in the programme. The paper concludes by highlighting major achievements and lessons learned from the programme for promoting lifelong learning for older workers.

## 5.1. Background

During the past 10 years Finland has been described as a model country in ageing policy. In September 2006 the international Bertelsmann Foundation awarded the Carl Bertelsmann Prize 2006 to the Finnish ageing workers policy reform. The reform was an outcome of an initiative by the Finnish government in cooperation with scholars and various associations concerned with improving working conditions among older workers (Figure 5:1). The reform consisted of several programmes. The most important ones were the national working life development programme (1996-99 and 2000-03), the national programme for ageing workers (FINPAW 1998-2002) and the national wellbeing at work programme (2000-03). These programmes addressed both the issue of older workers and lifelong learning (LLL). Central to the success of the reform policy was the national strategy and tripartite cooperation and commitment.

Figure 5:1 Ageing workers reform and its outcomes in Finland



Source: Barth et al., 2006, p. 68.

Discussion on policy and implementation focused on recruitment and retention of older workers in the workplace despite health-related problems and outdated qualifications (Barth et al., 2006). The common denominator of such efforts to reform working life was the aim of improving job satisfaction and wellbeing at work (Forss, 2004).

Since 2002, various ministries have launched numerous programmes to supplement the effects of reform policy. Programmes promoting LLL for older workers include NOSTE (skills development for low-educated adults), VETO (in-company practices to extend working life) and TYKES (improving the workplace and work organisation) (Figure 5:1). In these programmes, participation and learning are supported through development projects and financial benefits. The NOSTE programme is aimed at adults who lack basic vocational education. All three programmes have interministerial advisory boards, which support implementation and continuation of national development programmes. In parallel, a pension reform aimed at raising the retirement age was carried out in 2005.

The goal of this paper is to describe the NOSTE programme from the point of view of LLL for low-educated older workers. We start by describing the goals and implementation of the programme and proceed to a more detailed consideration of major achievements, such as outreach activities, support and counselling on learning skills, cooperation and networks, and working-life-oriented adult education. The paper concludes with remarks and reflections on successes to date and key issues that need to be considered when launching similar programmes.

## 5.2. Description of the NOSTE programme

### 5.2.1. Goals

The Ministry of Education, in cooperation with the Ministry of Labour and social partners, initiated the NOSTE programme in 2003. The programme finished in 2007. It was mainly targeted at working adults aged between 30 and 59 with no post-compulsory qualification. The programme was also used to support people in completing their basic education. The target group consisted of approximately 350 000 Finns and the programme aimed to reach about 10 % of them. Several training- and employment-related objectives were set for the programme (Box 5:1).

#### *Box 5:1 The aims of the national NOSTE programme targeted at low-educated adults*

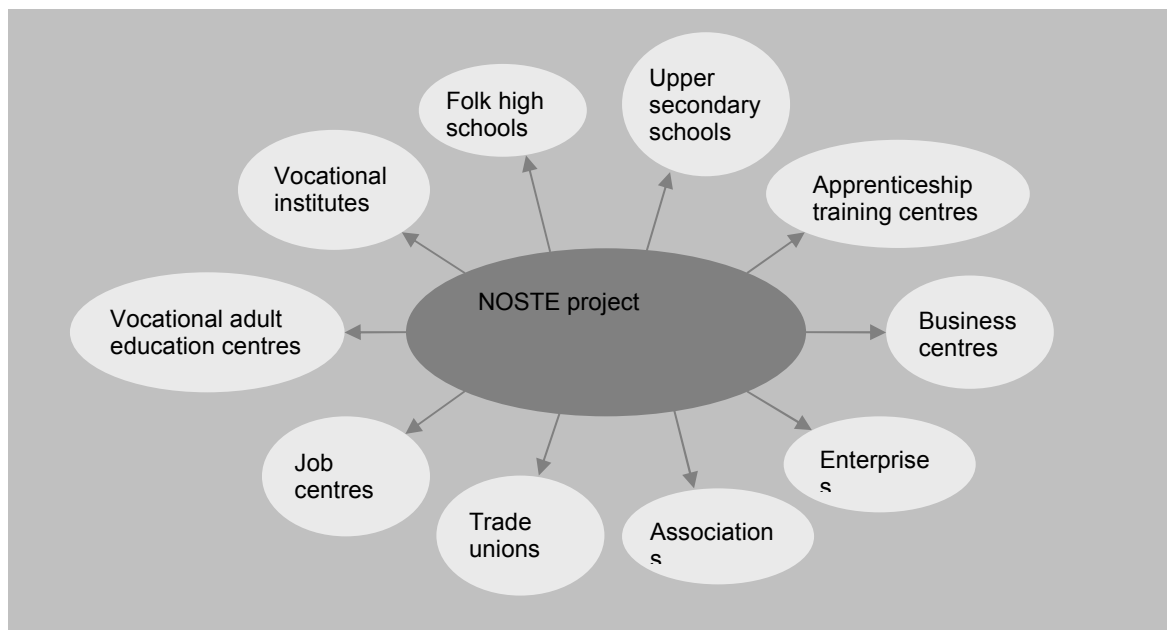
Improve low-educated adults' career prospects and job satisfaction.  
Relieve labour shortages due to the exit of large post-war age groups from the labour market.  
Raise the employment rate.  
Improve adults' chances of entering ordinary publicly financed vocational training.  
Increase intake of adults in vocational programmes and computer driving licence courses.  
Increase educational provision geared to untrained adults in general and vocational adult education.

### 5.2.2. Implementation

Implementation of the NOSTE programme was based on a decree given by the Finnish government and on general guidelines laid down by the Ministry of Education. According to these guidelines a project applying for the programme had to be organised as a larger network of institutions. The final form of the network was decided locally. As a result, there were 60 NOSTE network projects, varying in size and composition. These local and regional networks represented clusters of education providers and social partners working together to improve participation of low-educated adults in education (Figure 5:2).

The main activities in the networks were training outreach services, training/studies alongside work, and regional cooperation between education and training providers, including guidance and support services.

Figure 5:2 The form of regional NOSTE networks



Participants in the various training projects studied for vocational degrees or parts of these. It was also possible to take a competence-based qualification, a flexible scheme geared to adults. The programme emphasised support and access to education and training. Extra support in learning skills was offered to those who needed it. The training was free of tuition and course fees; students only paid an examination fee. There were no costs for employers either. The programme was financed nationally; in 2006 expenses were about EUR 30 million. The programme was followed by an evaluation study.

### 5.3. Actions promoting LLL for older workers

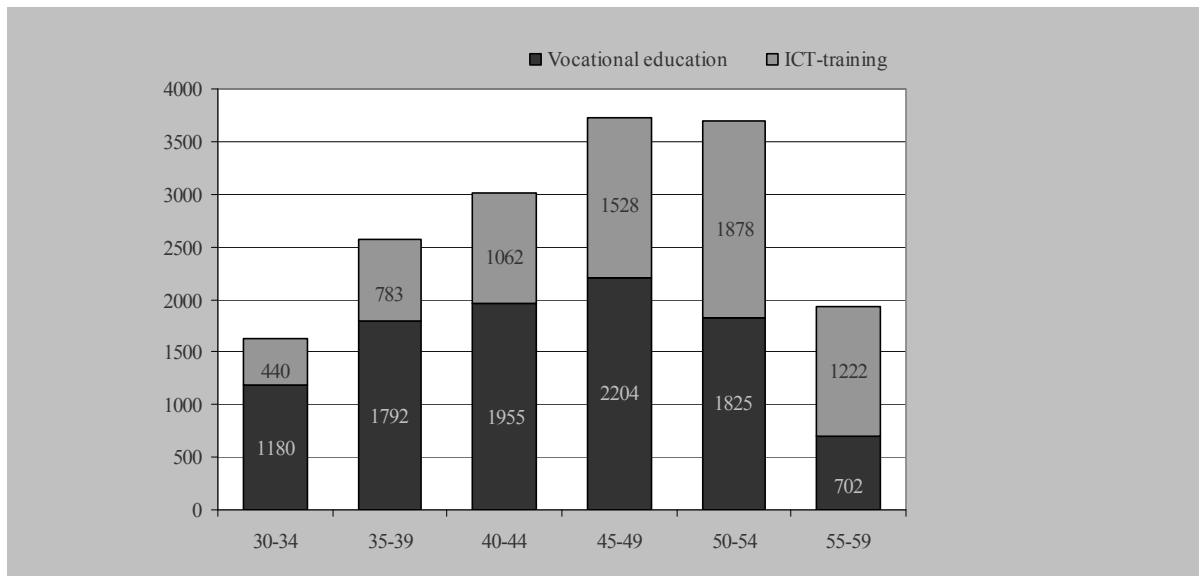
#### 5.3.1. Participation in NOSTE training

Numerous means were used to boost interest in participating in the NOSTE programme. These were related to the cost-free nature of NOSTE education, introducing new educational study, expanding the local training supply and efforts to support adults' learning (Illeris, 2003; Antikainen, 2005). The fact that the training was cost-free also increased employers' interest in training their personnel. Although these measures were successful in attracting more participants, the quantitative training goals have not yet been reached.

Approximately 16 000 adults began their NOSTE training by the beginning of January 2007. Most had taken part in vocational education organised by vocational educational institutions. More than 40 % of the adults started training related to information and communication technology (ICT). About a third of all NOSTE-training participants were over 50 years old.

There was a notable increase in the participation rate: since the beginning of the programme in 2003 numbers have almost tripled. The rate of participation has varied by educational fields and by region. Participation was highest in ICT training (computer driving licence): 41 % of all qualifications received through NOSTE during 2005 were ICT licences (Figure 5:3). Training in ICT was most popular in the oldest age groups. Although the relative proportion of ICT training was high in the programme, more emphasis was later put on vocational qualifications.

Figure 5:3 Participation in NOSTE training by age group in 2003-06



### 5.3.2. Outreach

Outreach is a process where people who would not normally take part in adult education are contacted in non-institutional settings and involved in attending and eventually jointly planning and controlling the activities, schemes and courses relevant to their circumstances and needs (Ward, 1986). McGivney (2000) states that the term 'outreach' is often used interchangeably with terms such as 'widening participation' and 'combating exclusion'. According to McGivney (2001), outreach activities mean people are made aware of existing educational possibilities, and education is provided in close proximity to clients or is even provided based on a needs analysis of the target group. However, outreach has come to be strongly connected with the notion of disadvantage and, thus, it has also acquired certain negative connotations.

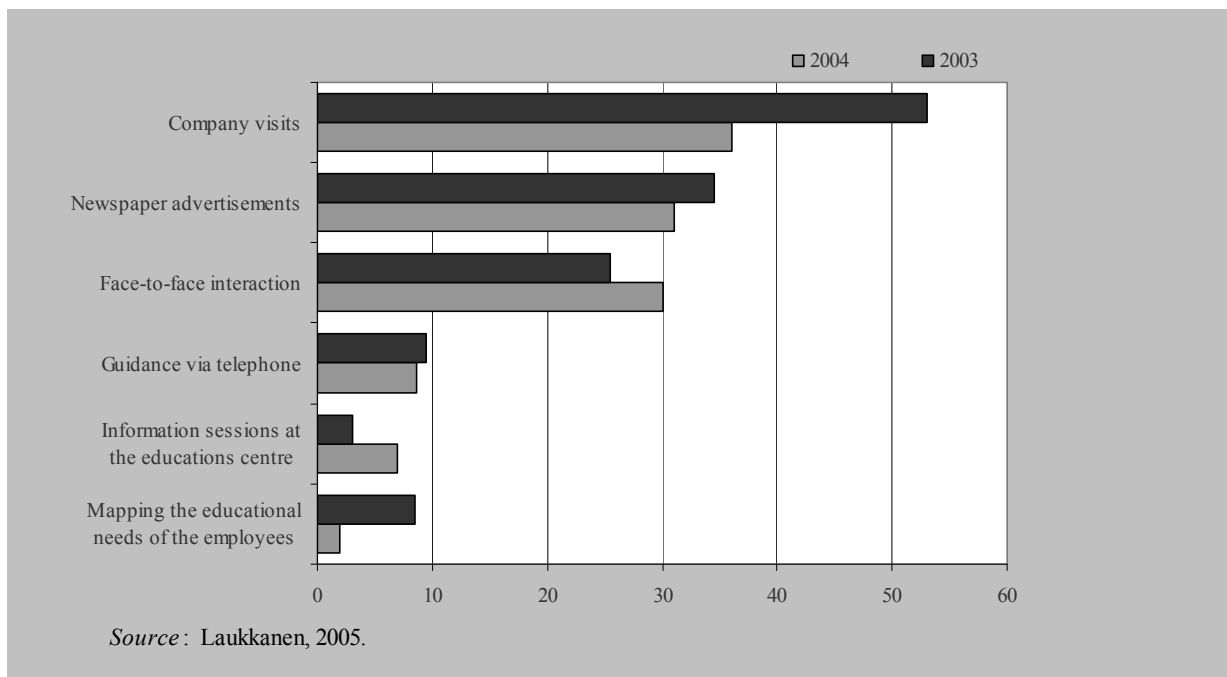
#### 5.3.2.1. Outreach activities to help adults to define their learning and development needs

In the NOSTE programme outreach was a means of helping people define their own learning needs. Instead of using outreach only as a marketing and recruitment tool, it became a process of community development among low-educated adults. This was especially the case in workplaces where participation increased most through the NOSTE programme

(Ministry of Education, 2006). Specific funding for outreach activities meant better opportunities to visit workplaces and share information about study possibilities with employers and employees.

The necessity of outreach activities led to learning and methods development in training institutions. Many educational institutions developed new approaches to attract their target groups. Most effective was a multichannelled combination of various marketing methods, which included company visits, face-to-face discussion, as well as traditional advertising (Figure 5:4). Voluntary competence pilots, trained by the Central Organisation of Finnish Trade Unions (SAK), were also part of these activities. They helped raise awareness of adult education and training options among their members in the workplace. Although the first experiences of the trade unions' outreach activities were positive, the unofficial status of the competence pilots in working life was a limitation on further successful action.

Figure 5:4 The best ways to reach the target group for NOSTE in 2003 and 2004 (%)



### 5.3.2.2. Reaching older low-educated workers for education purposes

Research on the effectiveness of outreaching activities in the NOSTE programme (Huusko and Luukkainen, 2007) emphasised the significance of personal contacts. In the context of education it often requires more time, motivation and encouragement on the part of older rather than younger adults to make them more interested in participation. While finding their way back into education, older persons ponder on their age and whether they are too old to study and learn. The amount and quality of age-related support available is clearly important. The older applicants are, the longer it takes them to sort out their life situation and decide to begin training (Hulkari, 2007).

Although education and qualifications are generally valued among older adults, they often have prejudices, based on earlier negative experiences of school, against education. Laukkanen (2005) notes people over 50 do not usually regard education as an option for themselves. Older workers may be suspicious of their learning skills, dislike education and schools, or already be looking forward to retirement and pension, and thus see nothing to be gained from embarking on a programme of education. It is thus important to overcome these prejudices, inform older workers about modern learning methods and qualifications, and encourage them to recognise their competences.

### **5.3.3. Needs-based support and counselling**

More individual solutions are required today than in the past regarding educational, professional and work careers. The growing need of counselling and support of older and low-educated adults has to do with changes in the world of adult education, especially the increase in information technology abilities required in the training process, demand for self-orientation required by fast-paced teaching, the short duration of education, the small amount of contact teaching and, in part, increased awareness of learning difficulties.

#### *5.3.3.1. Support with learning of learning skills, self-assessment and self-confidence*

For older participants in NOSTE, more than 30 years may have passed since they last attended school, a school which was also quite different compared to present-day adult education. Lack of adequate learning skills may create an obstacle to participation. Especially with older adults, there is a need to support their learning skills before and during their studies. Usually, the areas where older adults need extra support are languages, information technology and mathematics, but sometimes also such basic learning skills as writing, self-assessment, cooperation and communication, and self-orientation. (Hulkari and Mahlamäki-Kultanen, 2006a; 2006b; Hulkari, 2007) The relatively weak academic skills of older and low-educated adults have also had an effect on the organisation of education. The individualised nature of today's study arrangements have for many in the NOSTE target group meant a longer duration of training and a special need for support activities (Ministry of Education, 2006).

Organising support and counselling has been a challenge, as older adults do not always recognise their need for counselling due to weak self-assessment skills. Adults may also have reservations about the support measures available, which may relate to their poor school achievement and the self-induced shame it may have caused (Illeris, 2005). Older adults also expect counselling to be highly personal and individual (Hulkari, 2007; see also Ford, 2005).

### *5.3.3.2. Poor literacy skills of low-educated adults call for new pedagogy*

Many educational institutions have also paid extra attention to identifying the reading and writing difficulties of low-educated adults. It has been estimated that about one quarter of students in degree-oriented adult education have learning difficulties. Poor reading and writing skills are found, especially, among the oldest age groups (Piesanen, 2002). Taking learning difficulties into consideration in practical teaching has required critical assessment of the applicability of the constructivist learning theory, as well as special group and individual discussions about the planning of learning material and the contents and implementation of education. Also the slow pace of learning of persons with a long work history has to be considered in training. There is need for a new pedagogy for educating older and low-educated adults.

### *5.3.3.3. Despite special funds and higher needs, little educational support has been provided*

The needs of older and low-educated adults for personal guidance have been higher than of their younger counterparts. Nevertheless, only 2 % of total funding was used for educational support measures in 2005 (Ministry of Education). The introduction of new working methods in educational institutions has been relatively slow and the resources set aside for educational support measures have not yet been utilised in a larger scale. Reasons include differences in support practices used in different fields of education, problems encountered by educational institutions in organising support and counselling, lack of professional counsellors in adult education institutions, and poor dissemination of information (Hulkari, 2007).

### **5.3.4. Cooperation and networks**

The Finnish adult education system has a long history of independent and segmented institutions. They have differing background values, identities, duties, and practices, are fairly small in size and scattered on long distances, as Finland is a large, rather thinly populated country. Networking and educational mergers are only a recent trend that began in the 1990s. It is commonly held belief that networks will provide more efficiency and quality and a greater customer orientation with respect to adult education (Jokinen, 2002; Varmola, 1996).

NOSTE networks were formed locally without strict governmental controls. Many of the project representatives established their networks with neighbouring colleges without any deeper strategic thinking. In particular, in networks within the same educational sector, competition was seen as a hindrance to full partnership. During the first year a lot of energy went on strengthening communication and trust between network members, but with practical results (see also Dudley and Horne, 2004). It was only after networks became more established that new innovations, cooperation, intensive communication, common trust, special competences and true commitment started to emerge (Nahapiet and Ghoshal, 1998).

Although partnerships advanced at a slower pace than expected, the NOSTE programme created the possibility not only for unparalleled cooperation but also for centralised information dissemination, counselling and guidance in adult education. Evaluation research (Hulkari and Mahlamäki-Kultanen, 2006a) suggests that networking has in many cases increased the customer orientation of adult education, made the local provision of education more diversified, promoted common sharing and development of skills and knowledge, and improved the chances of educational institutions to respond to the training needs of the target group. However, there still is a great need to assist further various NOSTE projects to find the models that best suit them in their task of supporting adult learning.

### **5.3.5. Working-life-oriented adult education**

The programme is implemented in close cooperation with social partners. They support and promote implementation of learning projects in workplaces and work communities. Emphasis of the NOSTE programme on working life has reinforced cooperation with working life in many educational institutions. The needs and views of the workplace as well as individual learning needs of students were considered when selecting the content, timing and implementation of training. Development of working-life-oriented education programmes required flexible and unprejudiced solutions from educational institutions and many joint negotiations, compromises and agreements between employers, employees and instructors.

The workplace is one of the most important learning arenas for older workers (Paloniemi and Tikkanen, 2005). In line with earlier studies (Paloniemi, 2006), research on the experience of NOSTE training has shown that older and low-educated adults expect the training they participate in to have a close connection with their work tasks and consider their earlier work history. The biggest pedagogical challenge faced by education in the workplace is how to combine work processes and theoretical knowledge through tutoring. The learning that students feel as essential for themselves concerns thematic fields and problems related to work. Studies taking place in the workplaces of the NOSTE target group, have also set instructors a demanding challenge. Instructors' visits to workplaces, counselling on on-the-job learning and organising work on a rotation basis, have been essential for developing a working-life-oriented adult pedagogy (Hulkari and Mahlamäki-Kultanen, 2006a; see also Parkatti et al., 2000). Both students and instructors are required to have skills that cross educational boundaries.

In the NOSTE programme, networking between educational institutions and working life includes much more than meeting the obligations and principles laid down by legislation or the financiers of the programme. Participation of low-educated adults in education depends on the way the training is connected with working life in practice. Employer involvement in the training arrangement and social support from the student's peer group and colleagues has in many cases been a prerequisite for completing the studies. The aim of the training provided in workplaces has been to connect the learning of individuals and benefits of education to working life.

## 5.4. Summary and concluding reflections

The NOSTE programme is at present the most important governmental policy programme in Finland promoting equality and adult education. Implementation of NOSTE has tested the capacity of the Finnish educational system to consider the needs of low-educated adults. The education of older and low-educated employees is not just a matter of developing and organising specially tailored pedagogical solutions; updating vocational competence is also a major issue. Today it is too early to evaluate the final outcomes at national level. In this concluding section we sum up the major achievements and factors, which have been critical in the success of the NOSTE effort to promote LLL among older workers.

### 5.4.1. Major achievements of the NOSTE programme

The major achievements of the NOSTE programme are summarised in Box 5:2. The programme is, above all, a structural solution designed to tackle low-educated adults' problems with participation in education. The NOSTE target group is heterogeneous and their personal histories, age, experiences, motivations, learning abilities and needs for support differ a great deal. Laukkanen (2006), in her research on NOSTE students' experiences of the training programmes, places strong emphasis on educational identity closely connected with the meanings participants give to education and training in their lives. For most of these adults the reason for participation was a change in their labour-market position (risk of unemployment or starting one's own business), growing demands of working life or the need for personal development. The accumulation effect of adult education (OECD: Statistics Canada, 2000; Blomqvist et al., 2002) can also be found among participants of the NOSTE programme. Many students had future training plans in accordance with the principles of LLL. However, these plans were more usual among younger than older participants.

#### *Box 5:2 Impact of the national NOSTE programme*

Increased interest and participation in adult education among low educated and older adults.

Increased wellbeing at work, development of professional competence, and growth of work motivation.

Development of pedagogical solutions suitable for older learners, such as outreach activities at individual and workplace levels, individual guidance and support on learning skills, and working life-oriented adult education.

Establishing new ways of networking and cooperation between educational institutes, stakeholders and employers.

One of the reasons for non-participation in adult education among older adults is lack of adequate learning skills. Only a few older adults have the learning skills needed to participate in education taking as its starting point the assumption that a student is active and self-oriented, the foundation of the current pedagogical practices and ideologies. In the NOSTE programme, the need to update the learning skills of older learners has been met by individual counselling and educational support. In particular outreach activities have helped motivate those who, based on their age and educational background, are the hardest to involve in educational activities (Laukkanen, 2005). In addition, the role of financial benefits has been crucial in increasing interest in adult education. Raising the level of education of older and low-educated workers requires support and resources from employers, and closer cooperation between education providers and working life than before (Hulkari and Mahlamäki-Kultanen, 2006a).

Students' experiences of the effectiveness of NOSTE education have been positive, especially when it comes to continuing in working life, increased wellbeing at work, development of vocational proficiency, skills and knowledge, and career development. For employers the benefits of NOSTE have been, in particular in increased vocational proficiency, skills and knowledge, work motivation, and commitment (Hulkari and Mahlamäki-Kultanen, 2006a). From the viewpoint of the NOSTE programme, LLL should be seen as a public and private investment. There is a need for proactive policies and more intensive partnerships to improve the participation in education of older adults for the ultimate benefit of the national and local economy.

The structure of the programme has been successful in reaching the target group and organising training. However, regional NOSTE networks differ significantly in the ways in which measures have been utilised. The success stories of individual NOSTE projects have been local and context-specific. The best pedagogical practices are often connected with the culture of the educational field or branch of industry in question. It is thus important to encourage individual projects to develop their own solutions to improve the quality of learning, professional development and learning opportunities for adults.

#### **5.4.2. Critical lessons to be learned**

Despite the resources set for outreach activities, training programmes started more slowly than expected. Partly this is because of regional differences among educational institutions, such as in the strategic meaning attributed to NOSTE. In institutions already with a lot of adult students, the importance of the target group was marginal. Also the local structure of industry and business, the employment rate and availability of the work force, defined the regional interest in the programme. In addition, the professional competence of project leaders, the support given by educational institutions, the numbers of organisational reforms going on at the same time, and the process of establishing cooperation between educational institutions and working life, were also behind the regional variation in the speed of uptake of the NOSTE programme.

Although the need of older adults for guidance and support was well recognised and funds were allocated for this purpose, educational institutions have not used these resources in an expected way. To be better able to respond to the needs of older students special attention needs to be paid to the education of all project representatives. To ensure common understanding and commitment among partners, it is highly recommended that this aspect of education is started well in time – preferably before the actual programme begins.

Networking has proved a challenge for project representatives. The networking process has required a lot of time. From the viewpoint of programme planning this means the time frame set for the programme has to be reasonably long to overcome competition and conflicting interests of partners. Educational institutions are not only steered by the human principles of the NOSTE programme, but also by institutional rules and the educational market economy. The intervention of the State is needed in creating equal opportunities for participation of older workers in LLL.

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# Chapter 6. An integrated competence-based learning system created by older US public workers: a case of state-operated services in Minnesota

*Renée S. Fredericksen*

## Abstract

This paper describes a personnel development project based on an integrated competence development approach carried out by the Minnesota State Operated Services (SOS). The project goals were to retain healthcare workers, improve their skill levels and elevate morale. With a starting point in lifelong learning, older workers designed a new integrated competence-based development system for all mental health workers. The paper describes the process and the main results of the project, based on interviews with six SOS leaders. The outcomes are analysed against the values and workplace expectations of older public sector workers. The results showed that the approach helped to combine the best of older workers' experience and soft skills with younger workers' energy and technology skills. Further, it can contribute to solving retention problems among American mental health workers. The approach is of special interest to public service administrators, human resource directors, policy-makers, and others interested in workforce retention, succession planning and intergeneration cooperation.

## 6.1. Introduction

Health and social assistance workers are at a premium in the midwestern growth areas of the US. In Minnesota public sector jobs were projected to grow by 11.6 % between 2006 and 2014. State service jobs were expected to grow by 34.2 % in the same period. The largest growth was predicted in health and social assistance (DEED, 2006a). However, healthcare work was considered difficult as it did not offer competitive wages/benefits for those with low education levels. Other incentives were needed, such as a work environment providing opportunities for lifelong learning (LLL).

Integrated competence development approaches attract and help retain health workers. Among the numerous Minnesota workforce development approaches, the most advanced model impacting older workers was in the State Operated Services (SOS) (Watson, 2006). Older SOS workers designed a new system based on LLL via an integrated competence strategy for all mental health workers. While it was premature to evaluate long-term impacts in 2006, it was a perfect time to analyse potential outcomes using what was known about Minnesota's older public workers' values and workplace expectations (Fredericksen, 2004). The first part of this paper presents the process and outcomes. The presentation, including most of the SOS statistics, is based on interviews with six SOS leaders. One was the director of human resources development (HRD), who had a leading role in developing the new HRD system. The second part of the paper focuses on older workers, both from the

perspective of the senior managerial staff who developed the new LLL-based HRD system and of older employees who were influenced by the new system.

## 6.2. An integrated competence-based system created by older workers in the SOS

### 6.2.1. SOS profile

SOS was a business division of Human Services providing services in healthcare and community-based service settings. Workforce development in SOS involved 160 different mental health programmes for 5 200 employees in an average year. These programmes resulted from the downsizing of large mental health institutions across Minnesota over a 30-year period into 16 acute-psychiatric hospitals and several mental-health services in community settings. This evolving system of services brought with it an interest in LLL by older workers who experienced the many changes.

Approximately two thirds of SOS employees were female. In 2006 8 % of them were immigrants. Nearly 70 % of employees were older workers. In 2006, at least 3 204 SOS employees were 40 years or older and 1 775 of them were 50 years or older (Watson, 2006). Job classifications included human service technicians, security counsellors, licensed practical nurses, registered nurses, social workers, human service support specialists, mental retardation residential programme leaders, and general maintenance workers. The majority of workers were human service technicians between 40 and 49 years old or nurses between 40 and 60 years old (Watson, 2006). SOS workers had been employed in state service for a period between 13 and 17 years, which meant most would complete their full pension eligibility by 2011.

### 6.2.2. Internal vision of SOS: from 'expected' levels of performance to 'exceptional' performance for workers of all ages

Mr Lee Pierce, SOS director of HRD, exemplified the benefits of LLL and staff retention. He began state service nearly 30 years earlier at an entry level position (attendant guard) in a security hospital. His experience and training meant advances through state hospitals to his position in 2006 as director of SOS HRD. Mr Pierce seeks to secure that all employees have access to LLL which is critical for career advancement and good public service.

The wisdom and commitment of Mr Pierce earned the respect of all colleagues. However, his experience did not include the new integrated competence-based HRD system. Rather it became his job to develop this system between 2002 and 2006 with the help of an experienced advisory council. This system enabled the retention and career advancement of more state service workers from 'expected' levels of performance to 'exceptional'

performance. As an older manager, it was Lee Pierce's intention to realise exceptional performance and career advancement for workers of all ages in SOS.

### **6.2.3. The process of developing the new integrated competence-based HRD system**

#### *6.2.3.1. An integrated, human resources strategic system with a focus on core competences*

Phase I of the SOS older worker development was sparked by budget reductions, forcing administrators to simplify operations and reduce overheads. This meant shifting loosely associated employee development programmes to an integrated structure based on competence.

The goal for the new integrated competence-based HRD system in the SOS was to move from a maintenance system of filling position vacancies to integrated strategic improvement. Between 2002 and 2005, a clinical cabinet of 8 programmes coordinators and 3 clerical staff, all over 40 years, worked to develop the new integrated competence-based development system (ICDS).

Beginning with a vision based on an illness-recovery model, the clinical cabinet created a strategic plan for 11 core competences. The competences were associated with a performance review process to accomplish SOS priorities. Realising the vision required several key elements:

- (a) implementation of the new ICDS plan required clinical training funds;
- (b) each of the seven programme lines needed a training advisory committee to develop tactical strategies for providing training and implementing the new ICDS;
- (c) staff development in coordination with SOS older executive leaders demanded training programmes on: leadership development, business, training for managers, leaders and new supervisors and employee performance management.

Based on the 11 core competences, position-specific competences were developed to verify competence. Core competences included soft skills dealing with customer service, computer programme skills, and technology skills. Position-specific competences, comprising of knowledge, skills, and abilities, which were needed to perform specific job tasks, were identified in each employee's position description.

#### *6.2.3.2. Developing a digital personal and systemic development tool*

The new system required training by trusted older leaders to orient and train all staff on the new system. A new electronic tracking system to monitor progress and function as a personal and systemic development tool was developed.

Older workers used their experience to upgrade earlier development programmes across all services to complement the new ICDS. This was a challenge since programme developers had previously worked independently without much attention on how programmes might work together or whether they supported career tracks.

Accrediting agencies evaluated links between recruitment, position descriptions, evaluations, and promotions to ensure a friendlier coordinated system. This looked at how competences were identified, positions developed, recruitment conducted, selections made, orientation implemented, and how competence was measured or maintained.

Orientations were evaluated for content and each course was required to describe methods used to verify competence, and objectives tied to the competence. Results of each student's participation were recorded in a database with 100 % participation by the SOS workforce.

#### *6.2.3.3. A performance review process around core competences*

A performance review process was used to assess training completion and demonstration of competence levels achieved. Assessments occurred through classroom demonstration, or observation on-the-job, or performance in a skills lab. Failure to meet the competence resulted in an individual plan to achieve competence with further training, classes, shadowing, or with a mentor.

#### **6.2.4. Implementation of the ICDS**

Once development challenges were overcome, greater efficiency, effectiveness, cost savings, happier employees, increased quality, and more satisfied customers began to appear. Success was dependent on effective orientation, a cohort model, and team training based on a philosophy of LLL or continuous training.

Implementation began with SOS recruitment or job postings through Minnesota's digital screening tool to select candidates on the basis of key word matches. All employees and recruits were required to apply for positions they currently held or desired to hold. Selections for employment involved between two and seven interview questions per competence. Employee selections were competitive and based on exhibited competence levels.

Applicants included internal and external candidates who were eligible to apply continuously for advanced opportunities, as they achieved new levels of competence and as openings occurred. Under the new ICDS there was greater awareness of opportunities for all workers and a clearer description of the competence/expectations required for each job.

Once hired or working in a position, employees expected regular performance reviews. SOS performance reviews followed standard protocols regardless of the programme and were based on standard competences.

Training registration took place online via the SOS learning centre website. Training modes included video, online learning, 'practicums', 'webinars' and classroom training modules. Tuition reimbursement, after one year of full employment, was available on all labour-shortage positions including: advanced social work and medical degrees with a focus on mental health (physiotherapists, occupational therapists, rehabilitation specialists, nurses, and psychologists).

Improvements were driven by several factors:

- (a) evaluation of curriculum and student performance utilising outcome measures established by the University of Minnesota;
- (b) continuing medical education courses were accredited by the Minnesota Medical Association;
- (c) employee training records were available in real time on the Pathlore SOS learning centre website. Pathlore tracked all employees and training completed by each one along with outlining the final grade.

All employees had curriculum-based training plans outlining training requirements for all certifying agencies. The Pathlore learning management system improved the efficiency of planning and evaluation of staff performance.

SOS programmes used quality improvement indicators such as 'elopement' re-admission, and use of seclusion or restraints to measure service quality improvement. Improvement efforts included training to guide revision of competence definitions. The SOS quality improvement manager worked on components necessary to satisfy employee development plans by consolidating efforts between programmes, creating tools for risk management and programme evaluation in phase I of the ICDS.

Phase II of ICDS development beginning in 2007 involved outcome evaluations of efficiency, effectiveness, cost savings, employee satisfaction, service quality and customer satisfaction.

### 6.3. Older developers' perspectives on ICDS

To understand the overall impact of the new human resources system, interviews were conducted online with members of the clinical cabinet of the SOS. They felt that the new human resource system required strong leadership at all levels. Daily evaluation of practices and training materials were undertaken. Mentors provided practical examples of clinical guidance measures. All members felt it was important for all staff to participate in defining and realising success through regular communication and feedback. Members appreciated both formal and informal processes to promote system change. In essence, change was inevitable and everyone had to own, evaluate, and benefit from the change management decisions.

Staff development was now seen as a lifelong process. In general, the oldest workers were managers who advanced themselves as they gained experience and developed new levels of competence, even before the formal ICDS was launched. Younger workers were most often found in entry level positions that included very difficult and demanding tasks in their job descriptions, making it a challenge to retain them. Retention improved with ICDS.

### **6.3.1. Impact on HRM practices**

When asked how ICDS improved HRM, all agreed in regards the following:

- (a) improved accountability and intellectual growth versus job security tenure;
- (b) staff retention improved:
  - (i) new staff and bargaining units appreciated competence because expectations were clear;
  - (ii) conflict resolution was reduced;
  - (iii) it was easier to focus on competence goals and routes to achieve them when one saw how they fit into a larger plan;
  - (iv) managers were more objective in undertaking supervision and career counselling.

In general, cabinet members felt older workers were better off and more satisfied under the ICDS, and that reactions were more positive than negative. Box 6:1 describes the outcomes of the ICDS. Older workers were observed as reacting to the protocols of the new system with a feeling of greater inclusion in an evolving agency with changing demands for service.

#### *Box 6:1 Impact of the ICDS on older workers*

Older workers were viewed as better off and more satisfied under the ICDS:

- the new system fostered intergenerational learning;
- older workers were challenged by a flatter organisation and motivated by the new ways of achieving this mission through a competence-based structure;
- some older workers noted the new system was more equitable/sensible;
- there was reluctance by some managers to carry out the new strategy but all realised everyone must be on board to make it work.

Overall, older workers' reactions were more positive than negative to the new competence-based system:

- senior leadership motivated nurses and social workers to gain advanced degrees successfully;
- older workers utilised reviews to address competence and to support career development;
- loyalty and years of service were of value. They appreciated flexible schedules around training/school, and the blend of experience from older workers and new methods they picked up from younger workers. Older workers enjoyed achievement in areas they feared just a short time ago. They also enjoyed support for retraining in retirement to launch a second career;
- older workers were slowly adapting to change. Some still placed more value on flexibility to use leave time. Others liked predictability with a competence-based system.

### **6.3.2. Impact on succession planning**

When asked how the new ICDS impacted succession planning, the following comments were made:

- (a) the new system made it easier to identify 'up and comers' and provide competence training equipping them for challenges as future leaders replacing retirees;
- (b) the new system offered opportunities for everyone to take advantage of classroom training, mentoring, self-determination and practical application of standard competence-based practice;
- (c) a framework for succession planning was in place by encouraging experienced workers to mentor newer workers;
- (d) some clinicians kept up with recent practices. The new system enabled all clinicians to remain current more easily;
- (e) competence-based HRM was key to succession planning and knowledge transfer.

Overall SOS clinical cabinet members felt ICDS provided a stronger role for older workers in succession planning. Older workers were used for consultation, coaching and mentoring. The new system offered older workers a framework to consider newer workers as partners. In the end, older and younger workers learned from one another.

### **6.3.3. Impact on LLL and career development**

When asked for observations on how the new ICDS impacted LLL career development, the following observations were provided by employees:

- (a) LLL was supported in daily activities. Workers appreciated the link between mission, outcomes, activities and evaluation;
- (b) LLL occurred when supervisors laid out a plan and indicated each accomplishment in the plan opened up opportunities. Once employees trusted their supervisor, they became interested in continuous improvement and engaged in LLL;
- (c) SOS fostered LLL through ongoing training on and off campus; by maintaining challenging work;
- (d) LLL expectations were financially supported by conferences, mentors, peer consultation.

## **6.4. Some final reflections on the ICDS in the SOS**

Looking back, the greatest challenge faced by the clinical cabinet and programme managers implementing their strategic plan, was to pull together a comprehensive learning system across so many isolated functions. Implementation was difficult, due to the different

methodologies practiced across the programmes. Learning to set up and use technology assisted training and virtual classrooms, held its challenges amid satisfaction for reporting and service delivery.

The development plan begun in 2002 required a heavy commitment by the leaders designing and implementing it. Each leader worked hard to build positive relationships to merge old and new cultures. However, the rewards of these efforts included more than the accomplishment of the original goals. It revealed the character and competence of mature workers in public service in continuing to make their talent, experience and creative energy available to achieve the goals regardless of the challenge or personal risks involved. The following quote sums up the situation: 'Minnesota is a place where people live well and age well, and helps others in their community to do the same' (DHS, 2006).

## 6.5. Concluding comment

A great deal was accomplished between 2002 and 2006 under phase I of the SOS ICDS. SOS development leaders were the first to admit they had a long way to go and undertook an evaluation of the entire strategy before proceeding to phase II. Pending the results of the evaluation, it appears that the ICDS model could be replicated in other public service and non-profit settings dealing with health and human services utilising the experience and knowledge of older workers.

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# Chapter 7. Older male workers breaking traditional work patterns

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## Abstract

The purpose of this chapter is to describe a boundary-crossing collaborative community regional development project, called MULM (middle-aged unemployed and low-educated men). The project is an example of how innovative labour-market solutions can be developed in a small region with a shrinking population, few job opportunities, high unemployment and where the number of elderly citizens is increasing. The goal of the MULM was to improve employability and make changes at organisational and regional levels to create favourable conditions for recruitment in the public healthcare sector. Community stakeholders from different sectors and agencies worked together with an ambition to develop favourable conditions for regional development and growth. Part of the innovative solutions was to introduce new, needs-based and flexible learning initiatives and techniques for groups excluded from the labour market. A central means to this end was to adapt learning techniques to non-traditional learners and adult learning. Six groups of participants, a total of 97 men, took part in the project. This chapter describes the MULM project and analyses the mechanisms for success in it. The paper also discusses to what extent, if any, it is possible to replicate the success factors from this project to develop better conditions for regional growth, individual employability and create job opportunities in other regions.

## 7.1. Focus on ageing regions with deteriorating employment

This paper describes a three-year development project, MULM (middle-aged unemployed and low-educated men), in which organisations in a small region in northern Sweden worked together to create job opportunities for older male workers and increase individual employability. The goal was to improve employability and make changes at organisational and regional levels to create favourable conditions for recruitment to the public healthcare sector.

The described region is in north Sweden, an area experiencing great difficulties in sustaining steady population growth. As a consequence of restructuring and global competition, the region is suffering from relatively high rates of unemployment among middle-aged and older male workers. Due to market competition and cuts in the public sector, many companies, both in the service sector and industry, are closing down their businesses. The younger population chooses to leave these regions due to lack of jobs and opportunities to continue further education. This region is also experiencing a matching problem on the labour market as potential employees are sometimes regarded as unemployable. The classification of unemployable people is often based on discriminating criteria, such as gender, age and nationality. A recent study showed that young people who choose to remain in the region are regarded as losers among the middle-class population, as they do not aspire to make changes to their lives (Svensson, 2006). People who choose to stay in this region are

middle-aged or older and some are retired or have been granted early retirement pensions by public sector employers. As a result, the public healthcare sector and the municipal service for the elderly are finding it increasingly difficult to recruit workers in many areas in Sweden.

To solve local and regional labour-market problems such as lack of jobs, exclusion from working life and difficulties in recruitment, requires people and organisations to think differently. Mainstream solutions do not seem to be sufficient in solving these issues based on structural changes. The European nations have agreed on common strategies to promote economic growth and on how to develop a knowledge-based society. These strategies include, *inter alia*, introducing lifelong learning (LLL) as a means to develop employability among citizens. People are expected to adapt to the demands of employment, which means participating in skill improvement and continuous learning. Individual employability means a person who shows initiative, flexibility and availability (Garsten and Jacobsson, 2004).

The rest of this chapter describes the planning and implementation of the MULM project and analyses the mechanisms for success in it. We will also discuss the possibility to replicate this project to develop better conditions for regional growth, individual employability and create job opportunities in other regions.

## 7.2. The MULM project: from an innovative idea to a collaborative success

The MULM project is based on experiences from a European research project Learning-in-partnership (2001-04). The goal was to describe, analyse and compare the consequences of structural changes in Europe, with illustrations from each partner country. The project was coordinated from Leeds University Business School in the UK, with partners from Finland, Germany, the Netherlands, Norway, Spain and Sweden.

### 7.2.1. Starting with an idea of a middle-aged man

One middle-aged man, to become the project leader, played a central role in initiating and implementing the MULM project. He had recently moved back to his place of birth, as he was intending to make changes to his life. He left his job as a sales person for an international company and moved to this small region in north Sweden to be able to spend more time with his children. After some months of unemployment, he started to search for reasons why he could not find a job. He went to the county administrative board to ask for project money to map out in detail the employment situation in the region. To cut a long story short, he was granted money for a few months' work to do the mapping. His findings showed it was basically low-educated and middle-aged men who found it hard to find work in the area. Industries in the region did not expand when jobs were lost from other companies closing down. Women in the area found work in the public sector. Entry requirements for working in

industry were high whenever there was a vacancy. They basically required formal qualifications equivalent to either a leaving certificate from upper secondary school or a degree. In practice, this meant younger applicants filled the vacancies as they had acquired higher formal educational qualifications compared to the older generation of male workers.

The man in the story developed a simple but brilliant idea to deal with the situation. His idea was to educate unemployed middle-aged and low-educated men to work in the public healthcare service. According to his initial analysis, it was the only expanding sector in the area. To rely on younger people to work in the public sector did not seem to be a good option. Many young people consider work in the healthcare sector as low-status and low-paid work. He began working on his idea and it eventually led to starting the project. He financed the initial project with funding from the county administrative board and local authorities, and later from national and European funds.

The following facts were found during the mapping-out phase:

- (a) the majority of the unemployed men in the region were unemployed due to structural changes;
- (b) most were highly skilled in typical male sector jobs;
- (c) they could not influence the employment situation in the region;
- (d) many unemployed men still hoped they would find a job in the sector where they had previously worked;
- (e) these men needed to change their attitude with regard to finding a similar job and to become more proactive and search for other solutions;
- (f) they had been unemployed for a long time and had no social network or social community, which meant they needed to learn how to be part of a social community;
- (g) many of these men had bad experiences from school and, for them, going back to school was not an option;
- (h) this meant that to recruit these men, it was necessary to develop other means for training and learning;
- (i) it was necessary to make new alliances with research institutes to access contemporary research regarding adult learning and vocational training;
- (j) counsellors at the job centre were gender-biased in their practice – they did not advise men to seek work within the public healthcare service – however, it always came to mind whenever meeting unemployed women;
- (k) counsellors did not recognise or admit there was gender blindness in their roles.

### **7.2.2. The quest: changing the regulative framework and overcoming school anxiety**

Among the key questions raised very early in the project were: how to encourage middle-aged men to view working in the healthcare service as a career opportunity? And how to prepare people working at the public employment agency (job centre) to introduce healthcare service work to unemployed men?

The project leader spent some time at the job centre listening to talks between career counsellors and clients to find out whether he was right about his assumptions regarding career counsellors being biased in their advice. The issue about men not wanting to work in the health sector was based on his experience from living in the region. He knew what men in the area thought about working in the public healthcare sector, namely it was not the kind of work men do. Men work in forestry, industry, construction as carpenters, or they drive buses, and women – they work in the healthcare sector.

To develop favourable conditions for recruitment and creating job opportunities for people in the region, there was a need to develop a common understanding of the prerequisites and conditions for change. It was not enough to convince people working at the job centre to change their practice but also to make public service employers understand the situation. Moreover, to develop favourable conditions for training men to work in healthcare, the system for adult learning needed to become involved. A key problem was to change people's attitude towards working in the public healthcare sector. This required creating conditions in which the project leader could convince men to dare to try work in healthcare to find out what it is like. This meant that regulations in the unemployment benefit system needed to be modified. People who drop out of labour-market courses immediately lose their right to claim unemployment benefits. This would be a disaster for the project. He challenged the people in the system to stretch the regulations to make it possible for unemployed people to try working in the healthcare sector. With support from other community stakeholders, such as trade unions and local politicians, he managed to persuade the job centre to grant permission to allow people to leave the trial course without losing unemployment benefits. Due to this change in the regulations, several men dared to join the project to challenge their own attitudes towards working in public healthcare and they chose to stay on for the entire course.

After having succeeded in developing the right conditions for men to join the project, he still had to solve the problem of individual anxiety and fear of going back to school. For some men, it had been more than 30 years since they went to school and not all of them recalled it as being the best time of their lives. This again required him to challenge the system for adult education. Although the community learning centre had well-developed plans for adult education fitting well into the thoughts behind LLL, they had not developed pedagogical methods in which education and training were adapted for untraditional and highly-skilled learners scared of going back to school. By developing a 12 to 16-week course with public health service employers, the nursing college, the centre for adult learning and the

community learning centre, they managed to develop a study programme based on flexible learning and practical training. The contents of the course were intended to mirror individual needs for acquiring basic understanding of working in public healthcare, including practical experience of work content and tasks, providing basic ICT skills and support of distance learning. The idea was to build up a social community for people who had been unemployed for a long time. Each group of men could provide support for one another while participating in the course. A total of 17 people agreed to join the pilot project. Later, these people became mentors for the next group of participants.

### **7.2.3. Key success factors**

#### *7.2.3.1. Building a collaborative solution*

To realise the project, the project leader was required to organise several meetings with different organisations on an individual basis and then connect the organisations in a strategic network. A common understanding of the goals and ambition in the project grew with each meeting. By developing a common understanding of the project with financial and operative support from the county administrative board, different stakeholders and organisations realised they had a unique opportunity to develop better conditions for the region. They also learned to understand that the quest would not be won without joint collaboration, where each organisation needed to make changes and adjustments to their systems (Andersson et al., 2005).

The job centre got clearance from the government agency to allow people to try out participation in the project without a backlash on their rights to claim unemployment benefits. The nursing college developed courses adapted for male students, for example – what approach do I adopt when helping people to the toilet? Is this a task female workers should do? The centre for adult education had to develop a routine that could easily be adapted to individual study plans. Other issues were how to hold study groups together, even when they are all studying different subjects and at different levels. Employers had to prepare work teams to attract highly-skilled male student nurses and organise practical training. It was not likely that newcomers would just sit about and wait for instructions, as they all had experience from working life; many were used to a high level of autonomy in their work.

#### *7.2.3.2. The challenge of changing occupational attitudes*

The biggest challenge was to change attitudes to prepare men to regard work in a low-status, female-dominated sector as a new opportunity and a career move. The project leader had a clear thought on how to go about changing people's attitudes towards working in public healthcare and where each step was equally and strategically important for progress to be made – talks with mentors, developing support systems at workplace level and the possibility to have a choice of where to work.

Initial meetings for recruiting potential participants to the project were held at the employment office. These meetings were crucial for each individual but also for the success of the project. The project leader needed to get a good start for recruiting new participants – which was built up by an open atmosphere, easy-going attitude, clear answers, humour, and basically treating each individual with respect. It was also important to channel the anxiety of invited unemployed people. The project leader describes the change in attitude:

You could feel as the atmosphere changed in the room when people's anxiety was released and when negative attitudes turned to a more positive outlook – when people had changed their minds about the project.

However, some men said the following when they were introduced to the project: 'there is not a hope in hell that I am going to work in the healthcare service!' Nevertheless, they changed their attitudes, which resulted in them daring to join the project and trying out nursing as a job.

Changing people's attitudes towards work in healthcare was not an issue that could be left to be dealt with later on in the project; it had to be part of the whole process. By providing plenty of support during studies, time for reflection and allowing people to get a feeling of the job contents, participants slowly changed their attitudes towards working in healthcare and about the project. The project leader also regularly met the men for individual talks. They held regular meetings where participants could meet and talk to one another about the project without any other party present. People at the job centre started to advise men to take part in the project as a means of finding a job, and they invited the project leader to visit the centre continuously to talk to unemployed people about role models at work and about what it means to be a male nurse in a female-dominated sector. For example, he raised issues such as the notion of being only half a man if you are working in the public health sector.

#### *7.2.3.3. Developing a new kind of nurse training programme*

The idea of the MULM project was to organise a training programme which could provide an introduction to working in the public healthcare service. This is why the course varied between 12 and 16 weeks, depending on individual needs. Participants learned the basics of healthcare and were provided with an opportunity to try out three different work environments during four weeks of practice. In addition, they made educational visits to several other workplaces. During practical training, one person was appointed as a mentor/facilitator to guide each person in their work.

The training programme also included group discussion at the learning centre; the topics included gender roles and issues, changing conditions in the labour market, trade union roles, group dynamics, and so on. Each person had the opportunity to discuss and try their ideas and thoughts about working in the healthcare service as a member of a reflective community. They provided support to one another in the community when needed –

moreover, all participants became close and worked well together in teams. Besides through practical training and group discussions, participants also studied different subjects of their own choice. The classes were organised according to flexible learning which gave students opportunities to study at their own pace.

The overarching idea was to introduce participants to the idea of continuing their studies, to go on to further education and training, preferably to the nursing college. This is why the nursing college developed a nursing programme in which participants in the project were guaranteed a place if they wished to continue their studies.

To make the project successful, the nursing college was required to make some changes to its training programmes and in the organisation of courses as well as in the prerequisites for applicants. They developed specific training programmes adapted for male student nurses, which were adjusted in contents, length and practical in-house training. Instructors and teachers were prepared to receive male students, as they were a new target group for their courses. Teachers and instructors from the nursing college and managing staff at workplace level developed mentoring programmes for workplace training to support untraditional learners and male students. Many participants had no previous experience of nursing.

After joining the short introductory programme, male students had the option to carry on to further education or try for a job. Some previous students were asked to go to the job centre to talk about the programme and promote working in the public healthcare service and joining the project. By asking previous students to talk about their experiences from work and to describe what it was like to study as an adult, it helped encourage more men to join the project.

The initial ideas of the MULM project were to make individuals more employable and create job opportunities. Additionally, participants learned to become more employable. This joint effort would not have been successful without common understanding of the project goals and the ambition to develop favourable conditions on the labour market in the region.

### 7.3. Assessing the outcome

In this section, the results of the project are discussed on three levels: regional, organisational, and individual. A starting point is to draw some conclusions from the summary and final report of the follow-up and evaluation of MULM. Two people will describe their individual experiences of the project.

### **7.3.1. Regional development**

#### *7.3.1.1. Project outcomes in the region*

Below is a description of project results, which have been evaluated in terms of project goals:

- (a) 97 men participated in the project over the course of three years;
- (b) average age among the participants was 44, ages ranged from 20 to 61;
- (c) 48 % of participants continued in further education – nursing college;
- (d) 10 % stayed on to work in the healthcare service without continuing their training – in the municipal service for the elderly;
- (e) 15 % found other jobs in other sectors in the region;
- (f) 25 % are still unemployed or taking part in other labour market courses.

The labour-market goal in the project was defined as developing individual employability and individual goals were to develop individual growth and self-esteem. After the programme, there were 97 men in the region prepared to try public healthcare sector jobs. The public sector has a larger group of people from which to recruit, and elderly people in the region can be assured they will receive high-quality service in the future and when they need care.

Results of the project were publicised in the media, in national news and television programmes and also in newspaper articles. Previous participants shared their experiences with the audience and talked about changing career paths and the impact it had on their lives. Old people were also invited to comment on what it is like to receive help from male nursing staff.

#### *7.3.1.2. Changes in the nursing profession?*

Evaluation showed nursing tasks may change in the future. Male nurses make different choices when carrying out their duties, which can lead to developing healthcare services, especially in the municipal service for the elderly. When the different experiences people have are allowed to shape how people choose to do their work, it will create a degree of dynamism at the workplace. Even if there are mechanisms to conform people into acting in a traditional way, as collective learning processes often do, different experiences can bring in new perspectives. The work is independent and there are many opportunities to change work patterns and contents. One old age pensioner described a visit from a male nurse from the home care service as 'it is nice, he takes time to sit and have a chat and a cup of coffee with me'. The quote (from a local newspaper) shows that elderly people appreciate male home care assistants have other priorities when carrying out their work.

## 7.3.2. Organisational development: job centres and training institutes

### 7.3.2.1. Job centres

People representing the organisations describe this experience as being of great value in inspiring them to change organisational systems, especially those representing the job centre. They have discovered how important curiosity and choice is for people and for the success rate of labour-market activities. It is better to develop gradually people's skills in taking part in education and training. However, the psychological entry level is high, especially if one has bad memories of failure from one's schooldays, which acts as a great barrier for learning.

### 7.3.2.2. Training institutes

To create learning initiatives that can lead to increased employability or increased individual labour-market value, initiatives should be adjusted to adults participating in learning. A key issue is to emphasise the connection between previous experience, work and learning.

Assessing and accrediting previous experience and knowledge is important when planning individual study plans. It will boost people's self confidence when they feel a strong connection between their previous life experience, previous work experience, the learning activities they take part in and their future jobs. Elkjaer (2000) argues that each person participating in learning activities has different prerequisites to contribute to the situation. This suggests that learning should be based on people's previous experience and should be part of individual study plans when planning course content and activities. Box 7:1 shows a list of training factors which MULM showed to be highly important, when organising contents in learning activities for adult learners.

#### *Box 7:1 MULM experience: important factors for developing training for adult learners*

- individual study plans;
- defining outcomes of learning;
- accreditation of previous experience and knowledge;
- flexible pedagogical methods and learning environments;
- social support, coaching procedures;
- high level of work task integration in learning activities;
- comfortable surroundings and learning environments;
- mentoring programme at the workplace level;
- meeting peers and learning about the practice;
- follow-up and feedback on learning experiences;
- learning should be developed as a social practice.

### 7.3.3. Individual development

#### 7.3.3.1. Major individual gains

The project was important for men, especially as a means to develop their employability and for boosting their self-esteem and to learn more about themselves. Several men stated that they had had the opportunity of a lifetime by taking part in the project. The strong desire to stay in the region was one of the most crucial reasons given for choosing to continue to train to become a member of the nursing staff, as they were already settled in the region and it was not a realistic option to sell the house and move from the area. Nursing became a career path and a way to earn a living. They were provided with a choice between going to work in a female-dominated and low-status sector or staying unemployed. The quotes below illustrate participants' thoughts about changing career paths:

- (a) I view the training as an opportunity to get a job in nursing. Being unemployed really gets to me;
- (b) initially, I did not regard further training to become a nurse as an option. However, I do think taking part in the project will provide me with the opportunity to take on temporary jobs in the municipal service for elderly people.

The men also revealed that they had experienced a change in their personalities; they described it as a change from being a typical male worker into a softer and more understanding man:

- (a) I may have become a better listener;
- (b) I can relate more to life and existential matters and I am more humble;
- (c) I have overcome an apprehensive and negative attitude towards healthcare work.

They also reflected on how strange it is that manufacturing goods can be valued higher than taking care of old people. Further, the amount of support received during training, especially from the nursing college, the centre for adult education and the project leader, was highly appreciated. They described how continuous discussions about changing attitudes towards the job, issues like working in a female-dominated sector and working in a low-status and low-income sector have been important for them. They described the biggest impact the project had on them as being how they perceived themselves and how their self-esteem was boosted when they discovered they still had a value in the labour market and they can still learn a new job. However, they could not understand why salaries are so low for nursing jobs. Never the less, all the men who succeeded in getting permanent jobs did get higher salaries than their female counterparts:

- (a) this project gave me the opportunity to try out a lot of new things – which I otherwise would not have known about. The project also fast-tracked me into further education – the nursing college. I do believe that when the numbers of men working in the healthcare sector grows, it will eventually affect salaries and the status of the work;

- (b) it feels secure to work in healthcare, however, my income is lower than being unemployed. This project provided me with the opportunity to discover the pleasures of further education – otherwise I would not have continued with my studies.

### *7.3.3.2. Experiences of two new older male nurses*

Two male members of the nursing staff described their experiences of working in the healthcare sector, four years after their initial training and two years after the initial interview.

#### **Person 1**

I started the MULM project in September 2001, while it was still at its best. I have had different jobs in the healthcare service ever since, albeit on a temporary basis. There is no lack of jobs, but I would prefer to get a permanent position. I would prefer to work as a personal care assistant on a permanent basis, if I could find a client matching my personality. I do not find it a problem to get along with patients. I like to help others and it is an interesting job. The patients or clients are always so grateful and they show so much appreciation. This was not very common when I worked for the railways.

I have been offered a permanent position at the same place where I did my practical training. It is a job which I did not apply for – they simply offered it to me. However, I would prefer to get a job in the private sector and I have applied for other jobs. It is not a question of salary, I simply think jobs in the private sector are better. I need to make a decision about which job to choose.

I really liked the idea of the MULM project, and I do not regret joining the project. It made me a richer person and I learned a lot.

#### **Person 2**

I really like my job – I have been successful in getting a permanent position. I used to work as a joiner before my period of unemployment. I made the right choice – I now have a job. Obviously, my work status was higher working as a joiner, however, I do feel I have acquired more competence now that I am working as a nurse. It is still difficult for me to believe I managed to graduate from nursing college. I thought it would be a lot more difficult. As part of my career development, I shall train my colleagues in a lifting technique and take part in developing quality standards in our service for the elderly.

I would not have started to work in the healthcare sector if I had not taken part in the MULM project. It was important we had the choice to try the job out and not be penalised if we did not wish to continue. I needed convincing. My view of working in healthcare was really negative and was based on my not knowing better. But I changed my mind. I had the opportunity to develop my own opinion.

Sometimes, I carry out duties female staff usually do not do, for example, I can do some plumbing if necessary and if I have time. I also believe that I am more relaxed about things. It is important that the elderly can maintain their ability to carry out all the tasks they wish to do and that they are allowed to do so, even when it takes a longer time. We should learn to do our work with our arms tied behind our backs.

Once an old lady gave me roses – I knew then the flowers were a symbol of her being satisfied with my work.

## 7.4. Discussion on replicating the MULM success

### 7.4.1. Success factors in the MULM project

The project has shown it is possible to find ways to recruit people to work in the health and social sector if people from excluded groups are provided with flexible learning and training programmes matching their experiences and learning skills. If people are provided with learning opportunities in flexible ways, suited for individual prerequisites and for those found in the context of their local communities, they will take part in education and training which will increase their chances of employment (Randle et al., 2004; Crosbie, 2004). Today, these men are in demand on the labour market and in the community. Looking from the individual point of view, participants have learned to be employable by learning to work in the health and social sector. From the regional point of view, these men play a part in finding a better balance between supply and demand in the labour market and the long-term effects can be that they change gender structures in recruitment to health sector jobs.

However, to introduce innovative learning initiatives in collaboration with agencies who operate within the educational system is not an easy task. Svensson (2004) argues that to become successful with the idea to adapt the educational system towards the system of demand from employers and individuals, both systems need to go through major changes and learning demands need to be defined. This could mean representatives from agencies in the community and local politicians sharing a vision and a joint strategy for economic and regional growth where learning initiatives are connected to demands defined by the labour market, especially if they are aimed at creating new job opportunities.

Whether it is possible to replicate the success factors of the MULM project is not easy to predict. The rest of this section discusses the success factors at regional, organisational and individual levels. A summary of the factors is shown in Box 7:2.

### *Box 7:2 Success factors in the MULM project*

At regional level:

- a long-term strategy for regional growth was leading the work;
- a network strategy for collaboration was established;
- shared responsibilities were defined;
- stakeholders shared a common understanding of project goals and targets.

At organisational level:

- a learning-oriented process – not only focusing on getting results;
- formative evaluation and follow-up was included in developmental work;
- close collaboration with research organisations to learn and also for support;
- close collaboration with the employment office for recruitment;
- change of attitude and work patterns among employment office staff;
- change in the system to claim unemployment benefit;
- change of organisation and content in further education and nurse training;
- public employers changed the salary system.

At individual level:

- the project leader:
  - came from the area and could identify himself with the same situation;
  - was determined to make a difference;
  - used his outstanding communication skills to create favourable conditions for change;
- project participants:
  - support structures were developed for the participants;
  - talks between mentors and participants were included in the training programme to boost self-esteem.

Most of all, it seems vital that the project goals are based on the long-term planning of demands and needs defined at regional level. This requires that stakeholder groups develop common goals based on a shared ambition, which requires a shared understanding of ideas (Svensson et al., 2007). People representing different organisations can develop a shared vision for regional development and growth – and join their work in a strategic network to make up a critical mass (Svensson and Randle, 2006). To develop sustainable conditions and regional growth, the various stakeholders are required to be prepared to make necessary changes in their organisations. A network strategy can develop conditions in which organisations make up the critical mass for these changes (Gustavsen et al., 2001). When using a network strategy and a partnership approach in developmental work, stakeholder groups can make substantial changes in their organisations and systems to make a difference. In the example described in this chapter, some of the structural changes were applied to the systems of claiming unemployment benefits and nurses education adapted for male students. The network strategy can also work proactively when disseminating common ideas and tasks in the project and when disseminating results (Andersson et al., 2005).

By planning and setting up the project in close collaboration with research institutes, it was possible to monitor progress and take advantage of learning experiences to ensure

necessary changes were made. By sharing a joint vision in the stakeholder group, people received correct and identical information about the project from each party and it was, therefore, possible to develop necessary support structures for participants. Through support structures, such as talks with mentors and well-developed teams, participants felt enthusiastic about the project and dared to take life-changing decisions about their future careers. However, none of this would have been possible without one person, the enthusiastic project leader who knew the area, its history and the culture in the region. He could identify himself in the position of being unemployed and highly skilled. He never gave up.

#### **7.4.2. Risk factors: failing to copy ‘best practice’**

Some agencies in Sweden have tried to copy the MULM project. They have invited the project leader and previous participants to talk about their experiences and encourage people to take part in their project. After these visits, the project leader and participants have been able to reflect on why similar projects have failed in other parts of Sweden. In their opinion they did not manage to make necessary changes in the systems to claim unemployment benefits. The men attending the meetings never had the option to be curious about the project. Their local system was based on more rigid regulations and did not allow people to try the project without fear of losing their right to claim unemployment benefits. This threat inhibited the enthusiasm of people when making a choice.

When we followed the project leader to a nearby region to talk about the project, I noticed something I had not seen before, how threat can make people make the wrong choices. It seemed the people working at the employment office wanted the unemployed to follow all their wishes. They are left with no choice – taking part in the project or losing their unemployment benefit – not much of a choice.

There is always a risk when wanting to emulate ‘best practice’ if people are not aware of the ‘whole story’ – as they may miss some important and vital factors for success. It is also important to adapt the main components to contextual conditions. Other job centres did not succeed in their ambition to recruit men to the healthcare sector, nor did they succeed in creating common understanding in the local community. There was no stakeholder group who could discuss common goals or develop a shared ambition. The lack of network or partnership strategy in the community resulted in a negative outcome for potential participants. The organisations could not make the necessary changes in their systems, such as stretching the regulations for claiming unemployment benefits. In practice this meant that unemployed men did not dare risk taking part in the project. Box 7:3 summarises the factors that have led to failure in other projects which have tried the approach followed in the MULM project.

### Box 7:3 Risk factors leading to failure in projects similar to MULM

At regional level;

- the projects have been run as a labour-market course from the job centre instead of as part of a regional strategy for economic growth;
- the project goals have been to lower unemployment rates;
- there has been no stakeholder group or shared commitment.

At organisational level:

- the overarching ambition has been to create job opportunities by copying a successful project without finding out the mechanism for best practice;
- the projects have not been successful in finding a devoted project leader who could start from scratch to develop a network;
- making structural changes has not been on the agenda, therefore, the projects have not managed to change the system for claiming unemployment benefit.

At individual level:

- fear has guided people's choices instead of curiosity;
- there has not been enough applicants wanting to join the project.

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# Chapter 8. Lifelong learning policies and practices for improving older workers' employability: recent developments and challenges in Japan

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## Abstract

This article describes recent developments and challenges in the lifelong learning (LLL) policies and practice targeted at older workers in Japan. LLL can help older workers cope with several difficulties and opportunities in current labour markets: change in wage-age profile, impact of the economy and industry structure on on-the-job training, job insecurity and increased unemployment and redeployment practices, prolonged mandatory retirement, expansion of irregular workers, and IT-intensive labour market. The chapter is organised in four main parts. The first discusses the challenges for older workers in pursuing LLL now and in the future. To cope with the complexities of these issues, Japanese firms are more and more opting for LLL/training of their workers outside the workplace, thus resulting in a remarkable increase in the number of out-of-the-workplace LLL programmes to support older workers. Public-private cooperation is considered the key strategic thrust in these programmes. The second part describes the main features of innovative LLL programmes currently implemented by three organisations: Tokyo Metropolitan Government, Tokyo's neighbour Chiba Prefecture's Government, the Employment and Human Resource Development Organisation of Japan. Third, the article draws up several positive lessons from these programmes to encourage further efforts to advance LLL for older workers. Finally a brief account is made on the need for continuous monitoring and improvement of LLL programmes.

## 8.1. Labour market challenges and their implications for LLL for older workers

The young working population is rapidly shrinking due to the declining fertility rate and the rapidly ageing population. Greater participation of older people in the labour force is desirable and they should, therefore, be encouraged to stay employed and work longer. To be employed longer, older workers need to improve their employability through lifelong learning (LLL). This section will describe a series of challenges as well as possible LLL strategies for older workers to cope with rapidly changing socioeconomic contexts (as summarised in Table 8:1).

**Table 8:1 Labour-market challenges and their implications for LLL for older workers**

Labour-market challenges	Implications for LLL for older workers
Demographic change	LLL as a strategy to stay longer in working life
Economic and industrial changes altering approach to on-the-job training  Changing employment practices: <ul style="list-style-type: none"> <li>• from lifetime employment to lifelong career development;</li> <li>• dismissal, redeployment and job-change for older workers;</li> <li>• extended mandatory retirement;</li> <li>• increase in contingent/irregular workers.</li> </ul>	From total quality control on-the-job training to information-intensive and employment-driven LLL programmes From: <ul style="list-style-type: none"> <li>• job-specific skills training to career development;</li> <li>• reactive response to job-loss and change to continuous improvement of skills and job-insecurity coping strategies;</li> <li>• work longer to working 'smartly' in age-friendly working and learning environments;</li> <li>• fixed working styles/hours to flexible and diverse working styles and LLL programme.</li> </ul>
Other challenges: <ul style="list-style-type: none"> <li>• anxiety over future income;</li> <li>• IT and information intensive market;</li> <li>• national policy and legislation.</li> </ul>	From old-age poverty to income security through LLL. From 'how-to' IT operation learning to experience-valued applications of IT technologies.

### 8.1.1. Older workers and demographic change

Japan is ageing fast and the proportion of working-age population is dropping sharply. The birth rate is low – 1.29 in 2004 (MHLW, 2005) – and life expectancy at birth is getting longer – 86 years for women and 79 years for men (MHLW, 2004). The situation will accelerate in 2007, when the baby-boomers will begin to retire. Plenty of LLL opportunities are now available to older workers to improve their employability and stay longer in the labour market. However, the road ahead is not an easy one – people cannot simply be asked to live longer, work longer and learn more and longer. Learning must be supported, rewarding and purposeful.

### 8.1.2. Impact of economic and industrial shifts on on-the-job training

The most striking example of Japan's on-the-job training (started in the 1970-80s) is 'total quality control' operated by most large companies for workers at all age levels. Total quality control aims at improving product quality, work productivity, and cost-effective financial management. The entire personnel involved in product conception, production and sales takes part in the programme. It used to be a major workplace-based training programme, which contributed substantially to the international competitiveness of Japanese products. However, in the 1990s, the Japanese economy started shifting from secondary industry (manufacture) to third industry (IT and software service). Although the total quality control, consolidated in the 1980s, continues to support the manufacturing sector, it has now become less popular as management issues and applications of IT and computer software have brought up new training needs.

Besides the shift from the manufacturing industry to the IT-intensive one, the low economic growth period which began in the 2000s affected negatively the provision of on-the-job training in large Japanese companies with more than 300 workers (only 1 % of total

companies). Due to worsened economic outcomes and changed economic structure, large companies became less enthusiastic about offering on-the-job training to their workers, needless to say, to older ones. Companies started to dismiss many middle-aged and older workers instead of offering them training opportunities for furthering and updating their skills and redeployment. The down-sized workforce and diminished training opportunities for workers at the workplace were compensated by part-time workers, temporary workers from work-contract agencies, as well as by recruiting competent and qualified specialists from outside the company to key management posts. Small and medium-sized companies with less than 300 workers, which numbered 4.3 million in 2004 (99 % of all companies according to the *White paper on small and medium enterprises*, (JSBRI, 2005), were least affected as they have rarely or never had a capacity for structured and sustainable on-the-job training programmes for their workers.

Today, total Japanese quality control-based on-the-job training, is giving way to information-intensive and employment-driven LLL programmes jointly conceived and operated by public and private agencies accessible to workers of both large and small companies (described in Section 8.2).

### **8.1.3. Changing employment practices and LLL for older workers**

Nearly 65 % of firms with more than 30 employees provide off-the-job training according to the 2000 survey conducted by the Ministry of Health, Labour and Welfare (MHLW, 2002). Some large companies still conduct on-the-job training mainly focusing on company-specific vocational skills. The complex task of LLL-based employability improvement cannot be achieved by traditional Japanese workplace learning alone, which tends to prioritise acquisition of company-specific/company-selected skills and working methods. This means training and education for older workers should go life-wide (a main principle of LLL) and learning should take place at the workplace, community, educational institution, public and private training agencies, and home.

#### *8.1.3.1. From lifetime employment to lifelong career development*

Performance-based wage and promotion systems are gradually replacing typical lifetime employment practices in which wages rise and promotion is determined according to workers' seniority. The labour market for older workers has become relatively more insecure, competitive and result-oriented. Unlike during the lifetime employment period (1950-90), older workers can be dismissed as young ones if they do not perform well.

Job insecurity for older workers resulted in a painful experience particularly for those dismissed during the restructuring exercise which started in the 1990s. These workers are currently given re-employment LLL programmes and psychological counselling to help them recover from the shock of unemployment. However, job insecurity is not always a negative factor. It offers renewed opportunities to those unemployed older workers and young ones, if they are properly helped and guided, to plan proactively and develop a lifelong career

perspective. LLL can, in this case, become a more effective alternative to strictly vocational-oriented training for both older workers and workers-to-be older (young and middle-aged).

#### *8.1.3.2. Dismissal, redeployment and job-change for older workers*

Older workers aged over 45 represent 16 % of total unemployed persons (14 % for 45-54 and 18 % for 55-64) (MHLW, 2006). The higher percentage for the group aged 55-64 (18 %) is alarming for two main reasons. First, at age 55-64 workers enter a most mature period of their careers, and unemployment at these ages means a loss of important human resources. Second, once unemployed, it is usually very hard for workers of this age to be re-employed.

The 45-64 age group of older workers are usually dismissed or redeployed due to high seniority-based remuneration which employers cannot afford, or they become a target of restructuring and redundancy exercises to reduce production cost. Another adversity workers of this age face is employers' diminished interest to invest in their training (especially on on-the-job training) from which they see little return.

Older workers must, therefore, develop two proactive survival alternatives. One option is to continue to sharpen their vocational skills through LLL to remain or become an 'indispensable' worker who employers want to keep and pay well. Another option is to engage themselves in LLL-based vocational training programmes for job-change, redeployment, and different working modes (part-time, self-employment, working pensioner, work at home).

#### *8.1.3.3. Extended mandatory retirement*

The 1994 pension reform raised the eligibility age for national pension and employers pension insurance from 60 to 65 years, to be progressively implemented by 2025. The amended (2005) Employment Security Law for older workers obliges employers to raise the obligatory employment eligibility age from 60 to 62 years and to 65 years by 2013. For example, to implement this law, a major car producer and a security firm decided in 2005 to grant a yearly renewable re-employment contact (including part-time contract) to their retired employees up to the age of 65. Others are expected to follow.

To stay in the labour market up to the age of 65 means people need to work more than 40 years (for university educated workers). Such an extended work period definitely requires workers constantly to update and acquire new vocational skills. Besides, workers getting older find it useful to develop a set of new LLL and working strategies to compensate reduced physical and certain intellectual functions (stamina, hearing, eyesight, short-term memory, etc.). This implies 'working smartly' (in a group rather than individual, part-time). It is essential that employers equally provide working conditions and methods to suit older workers' physical/health state and satisfy their learning needs. In this respect, the science of labour (the work of the Institute for Science of Labour in Tokyo – see home page in

appendix), aimed to develop a knowledge base for age-friendly working conditions and methods, is a useful academic discipline.

#### *8.1.3.4. Increased contingent/irregular workers*

Japan has recently witnessed a sharp increase in part-timers (working less than 35 hours per week), temporary contractual workers and 'ready-to-be-sent' workers hired by contract agencies. The 160 % increase of contingent workers over the past 10 years is attributable largely to employers' attempts to reduce labour and administration costs and to inject cheaper and flexible workers (Morishima, 2001).

Putting aside the pros and cons of contingent workers on the country's economy, one obvious advantage for older workers is to become contingent workers (assuming their employability is ensured) as they have control over how much they work, their working hours and duration of job placement. It also allows more non-working time to spend on LLL.

One negative implication of the increase in contingent workers is that many employers are opting for hiring irregular workers over older regular workers, even when they are equally qualified, because the former are less costly. This leads to a waste of LLL efforts rendered by older workers. Moreover, employers, as pointed out previously, see little reason for training (in-company) irregular workers, and this fact undermines the importance of workplace LLL in general.

#### *8.1.3.5. Anxiety over future income*

Older workers' motivation to work is generally high in Japan (Iwata, 2002). What primarily motivates them to continue to work? The *survey on employment conditions of older persons* (MHLW, 2000) revealed that more than 81 % of older workers employed (55-69) had indicated they work because of economic reasons. It is important that older workers are rewarded by financial gain and security (through a new job) upon completion of an LLL programme by a higher salary, promotion, or a new job, etc. However, non-remunerated volunteer work should be kept as an option for those older workers who do not need financial reward for their work.

#### *8.1.3.6. IT and information intensive market*

The high growth economy which started in the 1960s came to an end when the bubble economy collapsed in the late 1990s to early 2000s. However, the IT sector expansion, started and sustained during this unfortunate economic period, continues to propel Japan's economy forward to a new stage of development. Already in 1999, the IT industry employed 3.64 million people (6.8 % of the total number of workers compared to 5.1 % in the US) (JIL, 2001). The *2001 white paper on the labour economy* (JIL, 2001) reported the encouraging opinion of many firms that some IT skills among middle-aged and older workers can even improve when getting older.

It is necessary for society to break a myth that computers are only for younger people. IT is not simply surfing on the Internet for quick retrieval of information. Rather, computer work requires analysis, synthesis and applications of retrieved information in work. The professional horizons of older workers can be enlarged and new IT jobs can become available to them if their basic IT operation training is combined with experience-intensive IT application-training (experience/evidence-based marketing software development, management software packages for 'what works and how', reality-tested consumer psychology software).

To become an effective IT applicator requires extended work and learning experiences which older workers have. The sector of IT applications is a promising job market which can be made more available to older workers.

#### *8.1.3.7. National policy and legislation*

A most significant recent national legislation for older workers is the Law for employment stabilisation for older people which prohibits mandatory retirement under 60 and obliges employers to make efforts for continued employment of older workers up to 65. Pension policy affects the decision of workers on when to retire or how long and how much to work, and, indirectly workers' needs for LLL. The 1994 pension reform raised the eligibility age for both national pension plans and employers' pension insurance from 60 to 65, to be progressively implemented by 2025.

The 1990 LLL promotion law set a decentralisation course at prefecture and municipal levels, which also encouraged public-private partnership, university-industry partnership, establishment of non-profit organisations, and publicly funded independent education/training corporations (Yamada, et al. 2003), all of which LLL adheres to as an effective strategy.

The Ministry of Education, Culture, Sports, Science and Technology (MEXT) established the LLL Bureau in the ministry. The MEXT promotes LLL at all education levels and its vision and policy of LLL is far-reaching, covering LLL activities in cultural, sports and social activities. This ministry promotes professional proficiency tests (in cooperation with private bodies), Kominkan programmes (public community learning centres), LLL-based adult learning, and the ELNET Open College – satellite-transmitted university-level lectures to adult learners at national level.

The Ministry of Health, Labour and Welfare is a major policy implementation body which promotes vocational training at national level. It maintains 600 public employment security offices nation-wide for job-announcement, job-placement and vocational guidance (Matsumoto, 2003). It oversees implementation of working regulations, employment (age discrimination, mandatory retirement) and implementation of pension and insurance policies. The Ministry of Health, Labour and Welfare also provides older workers and employers with

training grants for promoting diverse training programmes for mid-career and older workers (particularly for re-employment).

It should be pointed out that policies and laws often provide necessary legal measures but not sufficient and overall implementation strategies and conditions for advancing LLL for older workers. Further joint efforts are needed by all stakeholders to support the actual development and practices of innovative LLL programmes for older workers.

## 8.2. Innovations of LLL programmes for older workers

### 8.2.1. Tokyo Metropolitan Government

In Tokyo, 40 % of people over 60 have a job (58 % for 60-64, 42 % for 65-69, 19 % for 70+, respectively, *Labour force survey* [MHLW, 2002]). People in this city are in general motivated to work until an advanced age.

The Tokyo employment measures conference (2004) (an advisory conference to the Tokyo Governor) recommended the Tokyo Government to strengthen its support for re-employment of middle-aged women and older women after raising children, and occupational ability development of baby boomers and senior citizens.

The Tokyo Metropolitan Government established the Tokyo Shigoto (Job) Centre in 2004. It provides older workers (55+) with counselling and consultation services and seminars, and experiences in community work which are jointly planned, organised and implemented by private agencies. The counselling and consultation services are offered as an individualised 50-minute session, and are delivered by career counsellors, lawyers and other professionals.

Seminars and courses are given by business managers and executives and presidents of small and medium-sized companies, under themes such as: re-employment support lecture; talent enterprises want; personal computer course; new life design, etc.

Job-interview training is one of the main services provided. Older people often fail to obtain a new job simply because they do not have opportunities to develop sufficient interview and CV-writing skills before job-hunting. One person, according to the centre, applied for 20 jobs in vain because he had never been trained for job interviews. Career counsellors also teach concrete job-interview and CV-writing techniques. Trainees are presented with successful model cases and learn how to present their skills and experiences attractively and persuasively. 'Selling' oneself is not traditionally an easy thing and it even sounds a pretentious act for the Japanese whose culture has long taught modesty as a virtue and, therefore, people should not present themselves too assertively.

The Senior Citizens' Technical College was established in 1997 to provide LLL opportunities for older workers aged between 50 and 65. The college is also open to disabled, single

mothers, and people with unemployment insurance. There are 11 senior citizens' technical colleges in Tokyo. Courses are free and no academic degree is required for admission. However, students need to meet some prerequisite skill requirements and pass written examinations (Japanese language and introductory mathematics) and interviews. Senior citizens' technical college grants certificates in different vocational fields. There are two-, three- and six-month courses, run both as day and night classes. Various subjects offered are listed in Box 8:1.

*Box 8:1 Subjects offered at senior citizens' technical college*

- building management course;
- interior design;
- hotel restaurant service;
- business management;
- business refreshment course (e.g. personal computer);
- house-service course;
- real estate inspection;
- accounting;
- social security;
- tax management (corporate and income);
- building facility management;
- gardening.

What motivates older workers most for LLL is that senior citizens' technical colleges help, on course completion, their trainees look for a job in coordination with and help from the Tokyo Public Employment Security Office.

Tokyo Silver human resource centres (a pioneer of 1 544 Silver centres at national level with 765 000 members) was founded as a follow-up to the job stabilisation law for older workers (60+). While the senior citizens' technical colleges provide training mainly to well-educated and white-collar older workers (55-65), Silver centres support relatively low-skilled and modestly educated older workers (60+). There are 58 centres and 78 000 older workers registered in Tokyo alone (March, 2005). The centres have recently been receiving more and more contracts for offering high-skilled jobs (such as management of public facilities) to older workers competent in personal computer management, accounting and teaching. Employers of Silver centres' registered members pay Silver centres directly, which in turn pay salaries to older workers (nation-wide contracts amount to JPY 3 174 billion, approximately USD 260 million) (Asahi Shinbun, 2006). Although older workers are temporary and part-time workers, they are eligible for accident insurance.

Registered older workers at Silver centres are supported by two training programmes: 'employment support course for silver HRD' and 'senior work programmes'. Both are free of charge (with the exception of textbooks), and there are no specific entrance requirements (except that the learner needs to be a registered member of the centre).

The employment support course for silver HRD offers short (9 to 20 days) and practical courses in: personal computer, house-work support, parking and building management, office and machine cleaning, cleaning air-conditioning equipment, gardening and tree-planting, mounting instruments and techniques, painting, etc.

The senior work programmes offers (approximate duration of one month) both theoretical studies and internships in care service professions. Examples of comprehensive course offers are listed in Box 8:2.

*Box 8:2 Courses offered in the senior work programmes at Silver centres*

- philosophy of welfare and care service;
- systems and service for old and disabled persons;
- introduction to home-help service;
- understanding for disability and chronological diseases;
- psychology of old and disabled persons;
- family and old and disabled persons;
- introductory care service;
- housing support;
- home-help techniques;
- counselling and care-planning;
- fundamental medical knowledge;
- basic skills for home-care;
- basic rehabilitation knowledge;
- fundamental care-skills;
- care planning and development;
- recording and reporting techniques, experiential recreation learning, etc.

### **8.2.2. Chiba prefecture**

Chiba is a neighbouring prefecture of Tokyo and its Department of Employment and Work organises a 'Chiba re-employment training programme' in 13 locations, targeting workers between 45 and 65, especially those wishing to be re-employed. The target group includes women who are dismissed or have quit working for child rearing, and older workers who are after a new job. Priority is given to those who have not attended any public vocational courses over the past year. Eligible older workers must submit their applications through the Public Employment Security Office of the Chiba prefecture. This LLL system offers two- to three-month courses (six hours per day). A daily subsistence allowance and travel fees are covered by public unemployment insurance. There are no specific entrance requirements and courses are given free of charge (textbooks must be bought by trainees, however). Lectures are given by highly qualified professionals in each field of specialisation. Upon completion of the course, all trainees are assisted in re-employment in cooperation with the Chiba Public Employment Security Office.

The following high level courses are offered by Chiba centre: care and welfare service, personal computer and networking, medical office work and care service with PC, IT accounting, PC for business management, Internet business, training for care visit

personnel, practical training for accountants, IT practices and CV-writing and job interview, general introduction for post-retirement work (seminar).

Techno 21 (Matsudo-City vocational training centre) offers a six-hour course in basic operational skills for personal computer *Lets use PC* for workers 60+. This type of computer training programme specifically targeted at workers 60+ is still rare but is a potentially expanding market.

The Chiba prefecture also offers university-entrusted re-employment training programmes. Jousei International University (specialised in care service and welfare) offers six-month social welfare and care service courses and the programme involves both theoretical and practical training. This type of training course is popular among middle-aged or older workers, especially women, who seek care jobs for older people.

### **8.2.3. The Employment and HRD Organisation of Japan**

This agency was established in 1997 as a comprehensive and core facility of vocational capacity building of white-collar workers in Japan. The high-tech and information-intensive economy requires older white-collar workers constantly to refresh their IT-related skills, management skills, and more flexible and long-term career planning.

The Employment and HRD Organisation of Japan believes in the effective link between research, training and practice. With the support of an interdisciplinary advisory research team (scholars, industry human development specialists and centres, career counsellors, employment agencies, etc.), it undertakes research on career development of middle-aged or older workers (35+) to obtain research-based information on the requirements of support systems for the career development of the workers.

The Lifelong HRD Centre (nicknamed Ability Garden), a major training arm of the Employment and HRD Organisation of Japan, offers relevant training and education programmes, as well as training promotion grants to employers (career development grant for middle-aged and older workers 35+).

Career development programmes of the Ability Garden are based on the following long-term philosophical bases:

- (a) need for understanding 'self' in relation to their occupational choice and duties;
- (b) need for understanding occupational types and contents;
- (c) need for occupational experiences before occupational choice;
- (d) decision-making ability for selecting an occupation;
- (e) ability to implement one's occupational decisions;
- (f) ability to adjust to changes.

The training programmes of Ability Garden are developed jointly with industry and business groups and its seminars and courses contain both industry-specific subjects and common subjects for all industries and courses.

The satellite-based capacity development seminar (AG net seminar) transmits live interactive lectures (including live question-answer sessions) on innovative and practical educational courses from the Ability Garden studio.

The education and training for unemployed persons offers short (three and six months) new skills training and active re-employment skills (IT skills, self-presentation skills for CV writing, management, overseas work, etc.).

Another noteworthy programme of Ability Garden are its LLL-based career development courses for 'career designing' for workers up to 50 and for career consultants and counsellors.

### 8.3. Lessons drawn from ongoing LLL programmes

National policy and legislation to establish a decentralised infrastructure of LLL for older people has proved to be effective. There are several lessons to be learned from the LLL programmes presented in this paper (Box 8:3). The rest of this section describes them in detail.

#### *Box 8:3 Lessons to be learned from Japanese LLL interventions*

Central principles and practices for implementing LLL for older workers:

- locality and accessibility of training provision;
- public-private cooperation in LLL;
- flexible training provision;
- inclusiveness of training;
- life-course perspective and sensitivity towards heterogeneity.

Other important issues in implementing LLL interventions:

- LLL to be combined with assistance to job-search training;
- cost-sharing;
- training both with and without certification;
- high-quality/highly competent LLL trainers.

The creation of LLL councils at prefecture and municipal levels by the lifelong promotion law (Yamada et al., 2003) enables older workers to participate in LLL in local familiar learning settings and to benefit from support given by local authorities, as well as material and human resources made available locally. The presence of local public employment security offices and Silver human resource centres all over Japan also offer older workers easy access to

learning facilities where they live and have a family. Policy decentralisation also makes it possible for local LLL authorities to develop training programmes for older workers which are tailored to the local job-market situation and needs.

LLL and employment programmes jointly conceived, planned and implemented by various bodies (Ministry of Labour, Health and Welfare, public job placement offices, independent foundations, prefecture and municipal governments, industry, university and research bodies, non-profit and non governmental organisations, community centres, media) can enjoy a nation-wide political and legislative legitimacy, integrated infrastructure and multiple resource inputs, wider public and financial support, and a wide dissemination of successful models at both local and national levels.

Helping older workers simultaneously for LLL and re-employment is a main feature of Japanese LLL practices. Trainees are often required to submit course applications through public employment security offices which are mandated to assist older workers to find a job on completion of a training programme. This type of 'purposeful' learning (which was also advocated by EU *Memorandum on lifelong learning* [European Commission, 2000]) can serve as a strong motivating factor for older workers to continue to update or learn new skills through LLL.

LLL programmes should be inclusive. LLL opportunities should be non-discriminative and be provided for all workers. The programmes of the senior citizens' technical colleges and Ability Garden seem to favour the vocational skill development of white-collar mid-career and older workers. Tokyo Silver human resource centre and other Silver centres around Japan, on the other hand, support the training of relatively low-skilled and low-educated 60+ workers. However, both offer courses for the disabled, single-parent and the unemployed.

Job application skills (self-presentation skills) should be an integral part of training programmes. Job-interview training and CV writing are often taught in Japanese vocational training institutions. In Japan, the need for self-presentation skills has suddenly received considerable attention. Older workers who worked under a lifetime employment system (no CV updating was needed due to little job change), who have been dismissed due to restructuring exercises, are particularly in need of this type of training.

Highly-qualified and experienced LLL trainers, who are also lifelong learners, are needed for older workers. The university-entrusted vocational training programme of the Chiba prefecture can take advantage of high-level university professors and technicians, which can train older workers by linking both theoretical and practical aspects of vocational skills. Tokyo Shigoto (Job) Centre involves, as lecturers in training programmes, business managers and enterprise executives whose practical business experiences are valuable and realistic sources of learning.

Cost-sharing for older workers is desirable. Older workers' means are often modest. They are able to pay for textbooks (this is required for most Japanese vocational training) and miscellaneous expenses, but find it difficult to pay beyond these basic expenses. For

example, courses of the Chiba re-employment training centre are supported by unemployment insurance, and City and training grants provided by the local employment security office.

Convenient locations and flexible time for course attendance are important. Silver centres which offer both jobs and training for older workers have 58 centres in Tokyo alone. This is an ideal situation. Provision of both day and night courses are convenient for working older people. The relatively short duration of intensive courses (a few weeks for low-skill training and two to six months for higher level technical skills) have turned out to be effective.

Certification and licence are important for older workers seeking to update highly professional skills and better-paid jobs. But they are not an indispensable requirement. LLL training programmes without certification for relatively low-skilled older workers (Silver centre) is creating income and training opportunities for thousands of older workers (65-75).

Age-flexible LLL intervention is desirable. Vocational training programmes of the Employment and HRD Organisation of Japan start at the age of 35. The Silver centres' trainees are 60+. This flexibility recognises the heterogeneous nature of older workers and allows diverse skill development for older workers – 'learning to learn' skills, acquisition of new and updating skills, skills for re-employment, self-employment and self-presentation skills, etc.

This article has mainly described the positive aspects of LLL programmes. However, there are also unaccounted weaknesses and difficulties encountered in them. As stressed by the OECD (2006), it is important to assess and monitor periodically the effects of different LLL interventions on improved employability of older workers and other dimensions (health, job satisfaction). It may be ideal for independent bodies to undertake such evaluation and monitoring exercises to identify the strength and weakness of ongoing LLL programmes for further improvement. Programmes can be assessed, for example, by interviewing or surveying all the stakeholders involved.

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# Appendix: List of LLL agencies for older workers in Japan

## **Ability Garden (lifelong HRD centre)**

Employment and HRD organisation of Japan, 2006  
Provides career designing course for workers up to 50  
[http://www.ab-garden.ehdo.go.jp/Central\\_e/index.shtml](http://www.ab-garden.ehdo.go.jp/Central_e/index.shtml)

## **Chiba re-employment training programme [Rishokusha saishushoku kunren]**

Re-employment training for older workers 45-65  
Entrance-guide booklet  
Department of Labour and Employment, Chiba prefecture Government, 2006  
(no English website, contact: Prefecture Government Office:  
1-1, Ichibacho, Cuou-ku, Chiba City, Chiba 260-8667, Tel: +81 43 223 2110)  
<http://www.pref.chiba.lg.jp/english/index.html>)

## **Institute for Science of Labour**

Applied and basic scientific research on working methods/conditions and training  
<http://www.isl.or.jp/top-e.html>

## **Ministry of Education, Culture, Sports, Science and Technology Lifelong learning home page**

Main LLL policy and current programmes including adult education  
[http://www.mext.go.jp/english/org/f\\_lifelong.htm](http://www.mext.go.jp/english/org/f_lifelong.htm)

## **Ministry of Health, Labour and Welfare Department of employment measures for the elderly and persons with disabilities**

Employment support activities for older people and the disabled in cooperation with LLL training agencies  
<http://www.mhlw.go.jp/english/org/policy/p23.html>

## **Senior citizens technical college**

High-level professional skills training for older workers 50-60  
Bureau of Industrial and Labour Affairs, Tokyo Metropolitan Government,  
8-1, Nishi-Shinjuku 2 chome, Shinjuku-ku, Tokyo 163-8001, Tel: +81 3 5320 4862  
<http://www.sangyo-rodo.metro.tokyo.jp/index.html>

## **Silver Human Resource Centre**

Guide-book 2006  
Employment and training for both white-colour and low-skilled older workers  
National Silver Resource Centre Association [Zenkoku Silver Jinzai Centre Jigyo Kyokai],  
Sumitomo Fudosan Iidabashi Bldg. 2F, 2-3-21 Koraku, Bunkyo.ku, Tokyo 112-0004  
Tel: +81 3 5802 6333, Fax: +81 3 5802 6344; e-mail: ZSK@sjc.ne.jp  
<http://www.zsjc.or.jp/rhx/first/sitemap.html>

### **Techno 21, Matsudo vocational training centre**

Short computer skills training courses for older workers 60+

Entrance guide booklet, 2006:

<http://www.techno-21.com/> [in Japanese]

### **Tokyo job centre**

Provides vocational counselling, advisory service and seminars jointly organised by public and private training agencies

<http://www.tokyoshigoto.jp/> [in Japanese]

### **Open University of Japan**

Provision of innovative and flexible broadcast systems for the university-level LLL

<http://www.u-air.ac.jp/eng/index.html>

### **University-entrusted re-employment training programmes**

Theoretical and practical social welfare and care service courses for older workers

Entrance-guide booklet,

<http://www.ehdo.go.jp/tokyo> [in Japanese]

# List of abbreviations

SOS	State-operated services
HRD	Human resource development
HRM	Human resource management
LLL	Lifelong learning
ICDS	Integrated competence-based development system
MULM	Middle-aged unemployed and low-educated men [project]

Cedefop (European Centre for the Development of Vocational Training)

**Innovative learning measures for older workers**

*Cedefop*

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## Innovative learning measures for older workers

Learning cultures in workplaces are rarely supportive of older workers. Traditionally, older workers are considered as teachers and mentors of younger employees, rather than having learning needs themselves. Thus, when the workplace does not require them to change their job tasks, this gives rise to a feeling of why bother to engage in training. In addition, older workers' images of themselves as learners tends to be poor, giving rise to a self-fulfilling prophecy.

However, the worlds of work and learning can no longer ignore the increasing number of older workers in society. Innovative work practices and learning measures for older workers are required. From an employer's perspective, continuous learning and development are necessary for survival in increasingly competitive markets, but also have an impact on the quality of working life and its attractiveness for workers. From an employee's perspective, learning and development appear as a means to maintain one's potential for high-quality performance as well as one's employability.

This book gathers practical examples of private, local, regional and national initiatives and learning opportunities addressing the specific needs and profile of older workers. It is hoped that these examples will generate practical insights for readers into key success factors and challenging issues.

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