

## Needs Assessment of Training and Development for Best Ager (55+)

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**Abstract.** This critical topic is of particular importance in Germany, since the population, and therefore also the workforce, is undergoing demographic changes with a major shift towards older employees in working organizations. At the same time, a large need for highly skilled labor and leadership personnel is occurring and is getting larger over time. Therefore, it is all the more critical to keep current best ager employees up to date in knowledge and skills and also maintain them as an integral part of a motivated and skilled work force within the working organizations.

In this analysis, several papers concerned with the training and development of older employees will be compiled. Methodology of this meta-analysis is based on surveys conducted with employees in the best ager category, interviews led with experts in the training and development field as well as department chiefs of human resources departments, and content analysis of organizational homepages concerning their training and development offerings. A comparison with literature will round off the triangulation of the subject matter.

Based on the findings, the differentiated and distinguished needs of older employees will be examined and discussed. While it seems apparent that best agers have different needs – at least in some areas of training, in particular technology and computer applications – it is critical not to stigmatize and discriminate them. In an organizational context, it appears best agers do not want to be singled out concerning their needs, despite the fact that it might be critical for their training success to provide modified development programs.

In conclusion, it is critical to work with the sensitivity of the subject matter and introduce the topic of age categories (at least in some areas of training) with appropriate care within the respective organizations in order to allow productivity to remain at least at the same level.

### 1. Current situation in Germany

While in 1960 the 65+ year-olds of the overall population in Germany were at roughly 12%, this figure changed dramatically and more than doubled to 25% in 2010 [1]. The increase of this particular segment of population is indicative of the demographic changes Germany is undergoing. Birthrates have been decreasing over decades [2], while better living and working conditions as well as better healthcare are enabling the older population to live a long life [3]. The average life expectancy of men at birth increased from 69.62 years in 1980 to 78.07 years in 2011; simultaneously, the average life

expectancy of women at birth increased from 76.17 to 83.01 years within the same timeframe [4]. The above described demographic changes have an impact not only on the retirement system and costs in the healthcare sector, but also are noticed in the changes of the age-structural analysis in organizations [5].

## 2. Human resource development

Fast changing technology, longer life expectancy and the necessity to retain employability of staff make it a vital fact that life-long learning is more important than ever. In order to ensure that those employed in organizations – so called human resources – are not only keeping their knowledge up-to-date but continually develop it further to meet the demands of fast changing work environments and technology, programs need to be in place to offer such opportunities [6].

This results in life-long learning and makes training and development programs for employees as important as learning during childhood and early adulthood stages in primary and secondary education. Since most individuals likely have internalized how they were taught in school – even if this might not have been a recollection of fond memories – they tend to utilize these same schemes experienced earlier themselves whenever they need to convey content of learning to other adults. Especially when adults then are made to feel like small pupils in school, a resistance to learning might occur [7]. At that point it becomes important to clearly distinguish between andragogy versus pedagogy.

### 2.1 Pedagogy

The term pedagogy has Greek origin from the term *paidagōgĩa* and is concerned with instructional methods, education, and the science or art of teaching [8]. The components in Greek mean *paideia* = education, *pais* = boy or child, and *agein* = to lead [9]. As such, pedagogy is considered to be the science where humans at the beginning of their learning biographies are initially susceptible for pedagogical measures, but then with increasing autonomy actually are more inclined to andragogic measures as a complementary science [10].

### 2.2 Andragogy

The term andragogy has Greek origin and was initially mentioned in 1833 in Alexander Knapp's book "Platons Erziehungslehre" [Platon's Educational Philosophy], which was describing the necessity for life-long learning, not meant to be a science, but merely describing the practical education and learning of adults [11]. Andragogy did not succeed to establish itself, though, for quite some time; it underwent a revival in the 1920s and then became fully established through Malcom Knowles book *The adult learner: A neglected species* in 1978, where he described the emerging theories about adult learning and contrasted them with traditional theories of learning [12]. A summary of the contrasts between pedagogy and andragogy is represented in Table 1 below:

Table 1. Differences of pedagogy vs. andragogy [adapted from 13].

	Pedagogy	Andragogy
Learner	<ul style="list-style-type: none"> <li>- Dependent on instructor</li> <li>- instructor assumes full responsibility for what is learned</li> <li>- instructor evaluates</li> </ul>	<ul style="list-style-type: none"> <li>- Self-directed</li> <li>- learner responsible for what is learned</li> <li>- self-evaluation</li> </ul>
Role of learner's experience	<ul style="list-style-type: none"> <li>- little experience of learner</li> <li>- experience of instructor most influential</li> </ul>	<ul style="list-style-type: none"> <li>- great volume and quality of experience of learner</li> <li>- adult learners are rich resource</li> <li>- diversity of experience in group</li> <li>- experience is source of self-identity</li> </ul>

Readiness to learn	- Learning defined for students in order to advance	- any change triggers readiness to learn - need to know in order to effectively perform in aspects of life is important - ability to assess gap to where one is and where one wants/needs to be
Orientation to learning	- process of acquiring prescribed subject matter - content units sequenced to logic of content matter	- learners want to perform task, solve problem, & live more satisfying - relevance for real-life tasks - organized around work/life situations vs. subject matters units
Motivation for learning	- primarily through external pressures, competition for grades, & consequences of failure	- internal motivators: self-esteem, recognition, better quality of life, self-confidence, self-actualization

In particular, Knowles, Holton, and Swanson developed a model describing the practical applications of andragogy in practice. Andragogy’s central principles of adult learning entail the following: 1. Need to know of the learner, 2. Self-concept of the learner, 3. Experience of the learner, 4. Readiness to learn, 5. Learning orientation, and 6. Learning motivation [14].

These central principles are embedded in the individual and situational differences, in particular those found in the situation itself, the learning subject, and the individual differences of the learners. The even broader context then is entailing the intent and goals of learning, which are concerned with the individual, institutional and societal growth and development [15]. The model is depicted in Figure 1 below.

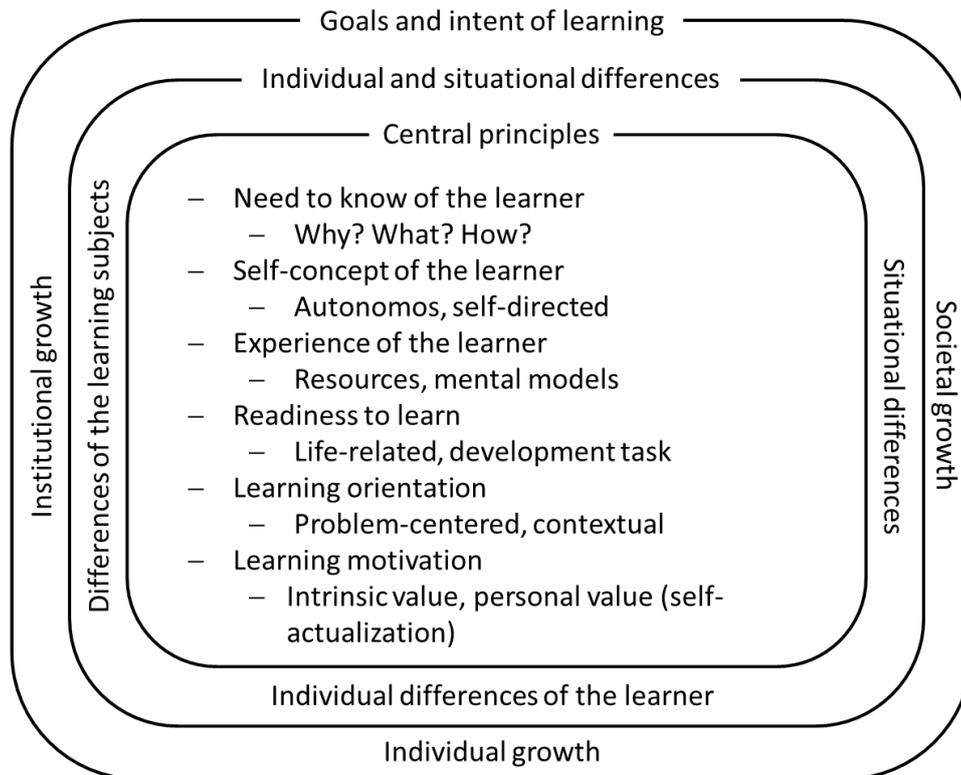


Fig. 1. Model of andragogy in practice [based on 16].

With the important factors in adult learning or andragogy clarified, the studies of the meta-analysis can now be further explored.

### 3. Methodology

In order to make conclusions on the rather complex situation of adult learners – particularly those in the best ager category, typically identified as those above 50 or 55 years of age – in organizations to maintain employability, a closer look at the different studies is taken.

All empirical studies utilized for this meta-analysis were completed under the close supervision of at least two professors/lecturers in either bachelor or master degree programs as either projects or final theses. Therefore, the instruments used conform to scientific standards and meet the quality criteria as specified for the respective methodologies in established literature. An overview of the empirical studies, the instruments used, and the sample size are provided in Table 2 below:

Table 2. Overview of empirical studies analyzed in meta-analysis.

Empirical Study	Focus Group Interview	Content analysis of organizational homepage	Expert Interviews			Survey of	
			Trainers	Organizational leaders	Scientists	Best agers	Organizational leaders
1 [17]				25		n=320	
2 [18]			1	2	1	n=47	n=29
3 [19]	8		2	2	1		
4 [20]		26		9		n=111	
5 [21]			1				
6 [22]			1	2		n=54	
7 [23]			1				

In order to consolidate the results of the individual studies, the categories of focus group interviews, content analysis of organizational home pages, expert interviews of the respective three categories trainers, organizational representatives, and scientists, and lastly the instrument of survey, which is subdivide into surveys with best agers as well as organizational representatives are aggregated.

### 4. Data sources

To ensure logical flow of information, the focus group interviewees with best agers are combined with the surveys of best agers. Similarly, the survey of organizational leadership representatives is also aggregated with the expert interviews of organizational leaders.

#### 4.1 Best agers: Focus group and survey results

Here the answers obtained from the eight focus group interviewees are accumulated and interpreted in combination with the information obtained through 4 different surveys conducted with 532 survey participants total.

#### 4.2 Content analysis of organizational homepage

For the content analysis it is imperative to draw samples from comparable organizational homepages [24] that clearly offer age specific trainings and courses concerning offers for best agers to arrive at meaningful comparison. Basis for identification of those organizational units were the awards ‘age cert’ or ‘FOKUS 50 Plus’ granted. Additionally, the homepages of those organizations that offered to participate in expert interviews and indicated to provide training for best agers were also analyzed.

#### 4.3 Experts

The category *experts* is subdivided into trainers, organizational leadership, and scientists in university

settings.

#### 4.3.1 Trainers

The group of trainers also entails consultants, who were interviewed and either conduct training themselves or actually consult with organizations in regard to demographic management.

#### 4.3.2 Organizational leadership

Furthermore, another group of experts interviewed is composed of 40 organizational representatives at leadership level, either executives or department heads of the human resources department. This group's results are combined with organizational leadership (n=29) that was surveyed.

#### 4.3.3 Scientists

Additionally, two professors, each of them an expert in adult learning, were interviewed as part of this meta-analysis.

## 5. Data analysis

After a careful review of the aggregated data, the following conclusions can be made for the respective groups of data.

### 5.1 Data analysis: best agers

Out of all the best agers (n=532) asked as part of the surveys, 61% were of the age group 50-56 years, whereas 57-60 years of age were represented with 16%, 61-63 years of age with 8%, and the group of 64+ only with 2%.

#### 5.1.1. Participation in training and development

When asked about their participation in training and development within the last 24-36 months, about half of all participants had taken between 1-3 courses, and about another half had signed up for 3-4 classes. On the other hand it became apparent that close to a quarter of participants had not taken any courses, and a few exceptions existed with participants taking 5 or more courses.

The overall observation of participants resulted in the conclusion that with increasing age less courses are offered to employees, whereas 63% indicated they would prefer to continue to receive training. This lack of participation might be because in 93.5% of their organizations training and development is a voluntary offering that might receive additional support through leadership or immediate supervisor. No training except for legally required recertifications or technical renewals is compulsory.

#### 5.1.2. Value of course offerings to participants

Of those that had taken part in course offerings, 68% considered the participation as positive and helpful. Reasons provided for not taking classes were manifold; between 29-45% were not interested in training and development due to lack of motivation, since they do not see a need to further learn and envision no perspective to introduce the newly learned skills to the organization. Another 36% feel they do not have sufficient time to take part in courses since their job is demanding and work will accumulate while they are in training.

The top three categories of courses offered consist of subject-matter and job-related classes of technical nature (ranging between 40-53%), followed by training in IT applications (ranging between 29-36%), and soft skills and methods (ranging between 23-36%). Here it is obvious that in all studies the participants are made up to 85% with best agers up to age 56; with increasing age, participation in training greatly decreases.

The argument on part of the organizations is assumed to be the cost of training and its amortization over the time span of employment, whereas this argument can easily be refuted when considering fast-moving pace of knowledge development within organizations and the need for life-long learning [25]. In order to ensure employability of all employees, also the older ones, constant training is

imperative.

Furthermore, best agers point out that their age group often times had long periods of learning abstinence, which in turn leads to reluctance to develop initiative and ask for training or participate voluntarily in it. Additionally, it needs to be factored in that even though 40% of best agers have a positive attitude towards training and development and another 55% feel neutral about it, most training designs are not necessarily suitable for them. The survey participants point out that often times they desire a slower pace of learning and see themselves challenged through the learning content.

### 5.1.3 Preferred training

Best agers would prefer age-group specific trainings in particular in areas of IT or technology, but overall also lack the applicability to daily work and the individual attention to training participants by the trainers. If training is conducted in mixed age groups, they would appreciate more understanding and time in a fear-free environment and would also welcome learning tandems.

As far as methods, best agers set a clear preference in form of conveying training content. Dissemination of new material might be best transported through exchange of experience and with the help of workshops and action-oriented learning. Best agers consider ex-cathedra teaching, lecturing, or self-directed learning as the least suited form of development since social support and interaction are missing. Similarly, these forms also remind them mostly negatively of their own time in school and therefore hinder learning.

With a few exceptions, most best agers are somewhat reluctant to undergo trainings with new media or technology. It appears that barriers of new technology can be overcome and computer training are best held in age-specific groups where the pace is slightly slower and adjusted to participants, while at the same time fear of embarrassment in the presence of young and tech-savvy individuals is avoided.

## 5.2 Data analysis: content analysis of organizational homepage

Focus of the content analysis are the following categories all deducted based on theory: position fixing and potential development seminars, learning tandems and age-mixed teams, mentoring programs, health management, life-long learning, interim and project management, and pre-retirement coachings.

All 26 organizations whose homepages were reviewed actually were awarded certificates for age-diversified and age-friendly work environments. While the homepages indicated possibilities for older employees to further qualify and participate in trainings explicitly, the offerings as such were, with few exceptions, not available in age-specific development groups, but rather open to all organizational members.

The category of health management was the one with most offerings (14) open to literally all employees. Here it seems reasonable that organizations are concerned about the well-being of all organizational members, but might also consider that not all age groups of employees have the same health or fitness level. Therefore, dividing groups wherever appropriate should be considered.

Learning tandems is the category offered second-most (7), with six organizations offering them particularly to address older employees in respect to including them in the learn transfer and knowledge management process.

Position fixing seminars and potential development is the next largest category (6), with all offers open to the entire group of employees.

Mentoring programs are offered in 4 cases for the older employees; here the best agers function as mentors of younger employees and by definition need to be within higher levels of the organization. Additionally, they also must possess much experience and the willingness to pass their knowledge on to younger members of the organization. Mentorship in general can be very motivating and valuable for both parties involved and reflects a very appreciative view of organizational experience and

members.

The least amount of trainings offered is in the categories of life-long learning for all employees (2), interim and project management courses for all employees (1), and pre-retirement courses aimed at the employees in the best ager group (1). Here it seems surprising that courses concerning knowledge management and life-long learning are not offered more [NUMMER life-long learning]and also marketed especially to older employees.

Overall, the content analysis revealed that even organizations that function as best practice benchmarks in regard to older employees seem to provide only few age-specific trainings and do not emphasize them accordingly on their webpages. Therefore, it can be concluded that either the presentation of best agers and offerings for them on organizational homepages and the employer branding signal this would set are highly neglected in Germany at this point. Another reason could be the lacking awareness of organizations to communicate these measures appropriately to their employees or external parties – or of course a combination of both reasons provided. Either way, organizations should strive towards more diversified course-offerings and better communication.

### **5.3 Data analysis: experts**

From the different groups of experts (n=2 scientific, n=6 trainers, and n=40 organizational experts), the following can be concluded about the learning of best agers:

#### *5.3.1 Reasons for training of best agers*

According to the experts, one of the prime reasons for training of best agers is their increased motivation and contentedness with work. Typically, they feel more valued and appreciated. Additionally, in Germany the factor of the demographic change needs to be regarded, which results not only in less young talents entering the organizations [26], but also more older employees remaining within organizations until their time of retirement and therefore need to stay employable. This can be guaranteed through proper qualification levels and training and development.

Furthermore, the willingness to perform is increased by proper training measures according to the experts, which in turn results in profits for the organizations. This seems to be especially important for organizations with declining staff and expert knowledge, since they even more so need to be engaged in retaining and training their employees.

#### *5.3.2 Determinants of training and development for best agers*

Some of the key issues determining the amount and necessity of training for best agers are based on the knowledge required within the organizations. Furthermore, the overall organizational climate needs to be appropriate for learning and ideally allows double-loop learning within a learning organization.

Even though predominantly large organizations offer diversified training opportunities and programs in a structured manner, with at least some of them geared towards best agers, the experts regard it even more necessary for small and mid-size enterprises (SMEs) coupled with employer branding and employee retention initiatives. The reasons provided are the increased need to secure knowledge transfer in a timely manner and also ensure employability of the best agers, who often times hold higher positions or functions in critical spots within SMEs, which makes them more crucial for the success and continuation of the organization.

Another important determinant of successful implementation of training programs is the support and need seen by leadership. Here the managers need to make it their task to discuss appropriate training and encourage employees accordingly to sign up for such courses. Additionally, the completion of the courses could be included in goal setting as part of the employee consultations.

Furthermore, attention needs to be paid to the fact that most best agers do not enjoy being stigmatized and feel the term best ager – or other words used synonymously such as silver liner, senior, etc. – should be handled with care. Experts warn to use such terms in an unappreciative

manner and emphasize to stress also the prime advantages this group of human resources possesses.

Abilities of the best agers are rated by experts as follows: a clear strengths can be seen in their psycho-social competences and their interest in new matters; this curiosity is best coupled with an approach to integrate experience and anchor new subjects in practice. On the other hand, the reluctance of best agers to attend training can be regarded as a weakness. Reasons for this apprehension are seen in decreased self-confidence caused through the first signs of physical decline noticeable during this life phase, leading them to question the performance of their cognitive abilities also.

A final determinant seen as important by the experts points to the shifted needs of the best agers during training and development settings. Here they emphasize the greater need of the learners to know why they are learning to increase their learning motivation and tie it to their previous experience through a problem-centered learning orientation, similar to what was demanded by Knowles [27].

## 6. Recommendations and future outlook

At least in Germany, most organizations might be aware of the threat of demographic changes and feel the first bottlenecks in recruitment for positions requiring highly skilled human resources, but organizational actions demonstrate singled-out approaches in terms of increased employer branding initiatives [28] without working on talent development or utilization of the best agers already embedded in the organizations.

First, (top) leadership would need to set an example by valuing and appreciating all age groups of employees alike and provide for planning of their development, especially during employee feedback ratings. Here, direct supervisors or department heads should determine jointly with the respective employees the training and development courses to be considered in order to achieve the goals agreed on.

Secondly, proper communication through home pages and human resource departments would need to be implemented to ensure full information of the measures already available to all, but particularly also to age-specific groups. Here, the content analysis revealed that even best practice examples of organizations do not offer a very broad spectrum of courses for best agers, nor do they communicate them particularly well.

Third, course design should be fitting for the age groups participating. This would mean that trainers consider previous experience and knowledge ensure that the pace is appropriate for the course members, and that the learning atmosphere is fear-free and tolerant of potential mistakes. Furthermore, it would be required that training is including methods that involve participants and utilize action learning and workshop elements instead of lecturing or self-paced or secluded studying. Additionally, clear goal orientation and applicability needs to be established in order for enhanced participants' readiness and learning motivation.

While it will be hard for German businesses and other organizations to face the challenges posed through demographic shifts, it is imperative to retain the current employees as long as possible at a high level of employability. Businesses need to become more anticipatory and open towards a diverse personnel base including best agers and therefore also need to adjust their training and development offers.

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