Training Older Workers and Learners
Maximizing the Workplace Performance of an Aging Workforce

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To my friend Scott Pitts, who teaches by modeling behavior

To my stellar fencing friends Marek Petraszek, Justyna Konczalska, and Katarzyna Kuzniak, who teach by competitive spirit and ethical example

To my resident assistants Dennis Fiore, Andy Maggetti, Melanie Pezeshki, and Jasmine Singleton, who teach by sharing youthful enthusiasm

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And to all my OWL friends who have shared their working lives and generational differences with me

I dedicate this book.

—JLM

To all the OWLS and WLP practitioners who dare to dream dreams of an ageless workplace

To my coauthor Jim Moseley—this was his vision quest, and I was happy to share it.

—JCD
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Today, employers around the globe are taking a closer look at how to train older worker-learners (OWLS). For years, adult educators have recognized that older learners may require learning events that are different in design and content from those provided for younger adult learners. In the workplace, OWLS may also need some assistance and accommodation to capitalize on their potential for amplifying the successful performance of their companies and organizations. *Training Older Workers and Learners: Maximizing Workplace Learning and Performance* offers a multidimensional picture of OWLS and suggests ways to analyze, select, design and develop, implement, and evaluate OWL-friendly training.
Flocks of older worker-learners (OWLS) are staying in the workplace or returning to it, and experts predict that this trend will continue well into the third decade of the twenty-first century. At the same time, the level of education and training required for the current and future workforce is increasing.

OWLS are like and yet not like the other adults who populate the workplace. Organizations and those who are tasked with improving organizational, team, and individual learning and performance need to become better acquainted with OWLS, learn why and how to value them, and discover how to help maximize the learning and performance of the OWLS in their workplace.

**Audience**

We have written *Training Older Workers and Learners: Maximizing the Workplace Performance of an Aging Workforce* for workplace learning and performance (WLP) practitioners who need and want to learn more about the OWLS in their workplace. Workplace learning and performance is “the integrated use
of learning and other interventions for the purpose of improving individual and organizational performance” (Rothwell, Sanders, & Soper, 1999, p. xiii). WLP practitioners are active professionals from human resource development (HRD), instructional technology (IT), human performance technology (HPT), organizational development (OD), training, and other related fields. Students who are taking graduate-level courses in any of these fields and have some work experience in the fields will also benefit from this book.

WLP practitioners perform many roles—manager of WLP initiatives, analyst of human performance gaps, selector of learning and performance interventions, designer and developer of WLP interventions, implementer of WLP interventions, change leader, and evaluator of the effectiveness of WLP interventions (Rothwell et al., 1999).

WLP practitioners are also generalists. They know a little bit about a lot of different learning and performance interventions—and may know a lot about at least fifty different interventions, depending on their education, training, and experience (Hutchinson & Stein, 1997). However, it is impossible for WLP practitioners to have “sufficient depth of knowledge in all the necessary fields” (Spitzer, 1992, p. 118), so they rely on research, literature, and human expertise from a variety of fields to help them learn what, why, and how. This book will fill in some of the what, why, and how and refer them to other resources for more in-depth knowledge and know-how.

Goal and Objectives

The goal of this book is to help WLP practitioners maximize the workplace learning and performance of older worker-learners (OWLS), based on sound theory and best practice. The book will help WLP practitioners accomplish the following objectives:

- Identify the characteristics of OWLS as workers, as learners, and as retirees—or not
- Analyze the OWLS within a specific workplace
• Analyze workplace perceptions about OWLS
• Identify how theories and best practices in the field of adult learning apply to OWLS
• Recognize how cognitive, psychosocial, and physiological transitions affect the learning and performance of OWLS
• Recognize how learning styles and challenges affect the learning performance of OWLS
• Recognize how health, wellness, and leisure issues affect the learning performance of OWLS
• Apply knowledge about OWLS to the selection, design and development, implementation, and evaluation of training strategies
• Locate additional resources that will provide more in-depth knowledge and know-how about potential training strategies
• Collaborate with OWLS to manage, analyze, select, design and develop, implement, and evaluate OWL-friendly learning and performance interventions, and to initiate organizational change

Scope

Training Older Workers and Learners focuses on learning and performance in an aging workplace. The cast of characters includes companies and organizations, OWLS, younger worker-learners, and WLP practitioners. The main stage is the U.S. workplace; however, whenever possible reference is made to the global aging workplace.

Although the emphasis is on learning and training, the book will sometimes suggest nontraining interventions. More and more companies and organizations are recognizing that training may or may not be the solution to a performance problem. Training and development units within organizations are also beginning to go beyond training, taking a broader view of performance improvement.
How This Book Is Organized

This book is divided into three parts: Part One, Make Way for the OWLS; Part Two, OWLS in Transition; and Part Three, Transforming OWLS. The book progresses from knowledge to application. Parts One and Two focus on learning more about OWLS; Part Three is application-driven and includes a call to collaborate with OWLS to improve workplace learning and performance.

Each part begins with an introduction or advance organizer. The chapters each contain an introduction, a discussion of the topic, implications for workplace learning and performance, and action steps for WLP practitioners. The chapters may also include figures, tables, performance support tools (PST), and information on additional resources related to the chapter topic(s). A glossary, index, and complete reference list appear at the end of the book.

Part One: Make Way for the OWLS

Part One offers a broad view of OWLS as workers, as learners, and as retirees—or not; implications for workplace learning and performance; and action steps for finding out more about OWLS and their workplaces.

Chapter One—The OWLS Are Here. Learn about the aging global workplace and demographic shifts. Discover that OWLS may be older and younger than you think.

Chapter Two—OWLS as Workers. Find out why OWLS are in the workplace, how they impact the workplace, and how the workplace impacts them. Review some common workplace perceptions about OWLS as workers.

Chapter Three—OWLS as Retirees—Or Not. Learn more about the new face in the workplace—retirees. Read the stories of some OWLS who retired and returned and others who never left.

Chapter Four—OWLS as Learners. Examine major research, theory, and practice on later life learners (another term for OWLS). Investigate six major perceptions about OWLS as learners.
Part Two: OWLS in Transition

Part Two describes the transitions that OWLS go through as they continue the search for wisdom, knowledge, self, function, and well-being that they began in childhood.

Chapter Five—OWLS in Search of Wisdom: Cognitive Development. Discover how age-related changes may affect how OWLS think and remember. Be amazed at the potential of multiple intelligences.

Chapter Six—OWLS in Search of Knowledge: Learning Styles and Challenges. Learning can be just a matter of style, or it can be a major challenge for OWLS. Delve into the learning style preferences of OWLS. Learn how to translate the alphabet soup of learning challenges that follow OWLS from playground to workplace.

Chapter Seven—OWLS in Search of Self: Psychosocial Transitions. For years psychologists and sociologists have studied the passage from childhood to adulthood. Explore the various ages, tasks, and stages of OWLhood. Look into the generation gap that may challenge the aging workplace.

Chapter Eight—OWLS in Search of Function: Physiological Development. Learn about the normal, age-related changes that occur over the lifespan of OWLS. Find out what can be done to accommodate OWLS in the workplace.


Part Three: Transforming OWLS

Part Three is designed to help WLP practitioners analyze, select, design and develop, implement, and evaluate training strategies that will transform both OWLS and organizations into high-level learners and performers.

Chapter Ten—OWLS in Action: Sharing Experience and Motivation. Review the basic principles and practices of action learning. Decide whether OWLS have both the experience and the creativity to become action learners.
Chapter Eleven—OWLS on Teams: Collaborating to Learn. Discover the benefits of team versus individual learning. Explore ways to encourage OWLS to join the team and actively participate in team learning activities.

Chapter Twelve—OWLS on the Job: Learning with the Workflow. Learn how to help OWLS go with the flow when it comes to workflow learning strategies like just-in-time (JIT) or on-the-job (OJT) training. Check out how mentoring and coaching may encourage OWLS to share their experience and know-how with other workers.

Chapter Thirteen—Live OWLS: Learning in the Classroom. Classroom learning may or may not be just-in-time, but it definitely is real-time learning. Find ways that you can make learning sizzle for the OWLS in the classroom.

Chapter Fourteen—Virtual OWLS: Computerized, On the Web, At a Distance, Digitized. Today OWLS need to be computerized, on the web, at a distance, and digitized. Find out why OWLS may like or dislike virtual learning. Discover how to make virtual learning technology more user-friendly and accessible to OWLS.

Chapter Fifteen—Collaborating with OWLS. Learn that the best way to analyze, select, design and develop, implement, and evaluate training interventions that meet the needs of the OWLS and are OWL-friendly is to ask an OWL. Find out how to build a business case for collaborating with OWLS to discover their learning needs and find ways to accommodate their learning styles and challenges.

How to Use This Book

The reader should begin with Part One for a broad view of OWLS as workers, as learners, and as retirees—or not. Continue on to Part Two to discover more in-depth knowledge about OWLS. Part Two follows OWLS as they transition through cognitive development; changes in learning styles and challenges; physiological development; psychosocial development; and health, wellness, and leisure in search of wisdom, learning, self, function, and well-being.
Part Three is about specific strategies for training OWLS. The reader may read all the chapters in Part Three or concentrate on the one(s) that meet his or her immediate needs. Even readers who do skip a chapter or two should read Chapter Fifteen on collaborating with OWLS, to ensure that training interventions are OWL-driven and OWL-friendly.

**Some Final Thoughts**

The amount of literature on OWLS is staggering. Trying to winnow the wheat from the chaff was even more staggering. We had to ask ourselves, over and over, “Is this relevant to OWLS as learners and performers?” More often than not the answer was a resounding Yes. We made most of our decisions based on our experiences as WLP practitioners—and as OWLS.

We also struggled not to appear to stereotype OWLS or younger worker-learners. Joan and I are very similar yet very different OWLS. We both enjoy research and writing, teaching, consulting with organizations to improve workplace learning and performance, going to the theatre, walking, traveling, and gourmet dining. However, I am at one end of the technology continuum and Joan is at the other. I prefer face-to-face or telephone contact and writing or editing with a pen; Joan prefers emails or texting and says her handwriting has totally disintegrated through lack of practice—she writes and edits directly on the computer.

We hope this dichotomy has helped us avoid stereotyping either OWLS or younger worker-learners. You will note that when we discuss OWLness we use phrases and words like “some OWLS.” We also use “may” or “could” when we suggest learning and performance strategies.

One note of caution: this book will *not* give step-by-step recipes for training OWLS—OWLS are too diverse and the catalog of possible training strategies is too broad to be covered in one book. It *will* provide background information on OWLS and suggest implications for workplace learning and performance and action steps that WLP practitioners can take to help OWLS succeed in the workplace.
WLP practitioners need to know their audience—and there is a lot to know about OWLS. They also need to be able to help OWLS grow and flourish in the workplace—and there are a lot of opportunities for OWLS to soar. We’d like to think that the sky’s the limit, and we hope our readers will think the same when they have finished this book.

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