

In the name of meritocracy: managers' perceptions of policies and practices for training older workers

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ABSTRACT

Workplaces, managers and employers who are seeking to maintain the standing, capacities and productivity of their workplaces are now facing two crucial facts: (a) an ageing workforce and (b) all workers, regardless of age, need to adapt to the changing requirements for workplace performance. These facts mean that managers and supervisors need to confront issues found in the changing demographics of their own workforce. That is, as the portion of workforces aged over 45 years (*i.e.* older workers) increases, it is these workers who are available to be employed, and supported in sustaining their ongoing employability. To address these issues requires understanding of particular workers' capacities and aspirations and then acting to develop further their capacities based on new understanding, and rebutting social sentiments about these workers that are often value-laden, contradictory and biased. The case here is made through drawing on literature and analyses of interview data of Australian managers of older workers, that the current logic of management relies upon deeply held and widely shared beliefs of age-blind meritocracy and equal opportunity rather than informed views.

KEY WORDS—managers' attitudes and practices, older workers, education and training, employability, human resource policy, meritocracy.

Managers and older workers

Decision-making by employers and workplace managers is central to the kinds of opportunities provided for older workers' employment, advancement and further development: that is, their employability. In the upsurge of discussion, policy and research about ageing populations across the world,

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particularly in the last decade, there has been a considerable focus on the expectations and perceptions of managers toward the ongoing participation of older workers in the labour force. Indicative of trends in all Organisation for Economic Co-operation and Development (OECD) countries (Green 2009), the ageing workforce in Australia (defined here according to the Australian Bureau of Statistics standard of 45 years or more) is a large and rapidly growing population with diverse capacities, needs and interests (Kendig and Phillips 2007). Yet, much of the literature reports that employers, generally, are reluctant to hire people aged in their fifties and sixties and to train those already in employment. This reluctance is founded on the perceived deficits in performance, productivity and learning ability of these employees or because the return on training is held to be too short term. Here, underemployment arises and, importantly, employers are not fully utilising older workers' skills (Barnett, Spoehr and Parnis 2008), thereby limiting their employability. Further, growing numbers of workers are falling into new kinds of non-standard work arrangements outside linear career paths in the same organisation or profession (Kossen and Pedersen 2008). Consequently, older workers' efforts to secure employability are becoming more complex and perilous, all of which suggests fresh understandings by government and employers are required as they respond to demographic changes and trends in labour force participation (Hardill 2009).

In this context, a compelling need exists for research that explores and challenges conventional thinking to generate new knowledge and understanding. Riach (2006b: 1704) suggests that part of the problem to be addressed is that much literature focuses on the perceived outcomes of age discrimination, rather than providing 'theoretical insight into discovering why age inequalities exist.' While there is no shortage of empirical research relating to older workers, the theoretical basis of this scholarship is nascent (Phillipson 2004) and not yet inclusive of diverse perspectives (Riach 2006a). With some notable exceptions, Riach (2006b) notes that much of the literature on age discrimination has focused on 'seeking business and policy solutions' (1703) rather than on 'exploring the ideologies and processes of justification that lie beneath the assumptions made about older workers' (1702).

In response to this gap, critical theory approaches including the political economy of ageing offer insights that both illuminate and extend understandings about older workers' participation in the workforce (Taylor and Bengtson 2001; Walker 2006). Such approaches acknowledge that the experience of ageing is highly complex and variable as it is constructed in the context of ideologies, discourses, policies and practices that are mediated historically, culturally and situationally through specific power relations.

For example, the contemporary public discourse of ageing in countries such as Australia, the United Kingdom and the United States of America is framed ideologically in deficit terms with the retirement of so-called ‘baby-boomers’ viewed as an economic burden, particularly on future generations (Hardill 2009). Along with Walker (1981), we hold that such sentiments are consistent with a functionalist perspective that views ageing as a problem in narrow economic and instrumental terms. Specifically, Hardill (2009: 2) links the discourse of ageing as decline and burden to the fact that ‘the ageing body is equated in capitalist societies with a lack of value primarily because it is no longer productive’. Yet, the stereotypical belief that productivity declines with age is contested and not confirmed in research findings (Guest and Shacklock 2007). What must be undertaken then is to confront the duality of belief and logic that justifies age discrimination in contemporary workplaces.

Thus, research conducted from a broad critical theory approach provides an alternative starting point for understanding the subject’s lived experience and critiques how taken-for-granted or common-sense ideas and beliefs both generate and inform policy and practice. Earlier research by Walker (1981: 75) exposed the ‘differential’ effects of structural ageism with attention paid to issues of social policy and poverty. More recent studies shifted their analytic focus to the discursive construction of older worker identity (McVittie, McKinlay and Widdicombe 2003, 2008), including how women are ‘rendered invisible’ (Ainsworth 2002: 596) and silent (Riach 2006a).

An objective of this paper is to strengthen and provide coherence to this emerging strand of critical literature by providing insights into how ideologies shape managers’ perceptions about the ongoing employability of workers labelled as older. Drawing from diverse strands of critical theory, we mobilise the concept of ideology to refer to the shared ideas, beliefs, explanations, justifications and representations of social groups (Eagleton 1991; Žižek 1994). This conception of ideology is distinct from that of discourse, but in a way that supplements the materiality of its social-political implications (Mills 1997). Eagleton (1991: 194) holds, ‘It may help to view ideology less as a particular *set* of discourses than a particular set of effects *within* discourses’. Importantly, ideologies are not just abstract systems of belief or thought. Instead, they are mediated and embodied through discourse and different forms of social practice (Eagleton 1991). Thus, while ideologies are not always readily transparent, particularly if they are presented as self-evident or common-sense, they can have material effects (Žižek 1994). Ideologies are, therefore, important for understanding the construction of managers’ perceptions of workers who are labelled as older.

Despite its pervasiveness, age discrimination in the workplace is complex and ambiguous, and can appear as benign, normal or invisible (Riach 2006b).

In this context, research suggests that employers are doing little to address ‘the “problem” of an ageing workforce’ (Vickerstaff, Loretto and White 2007: 219). Here, the perceptions of managers who have both the power and day-to-day responsibility to make decisions for older workers are key particularly as it relates to the provision or denial of opportunities for training and skill upgrading to maintain their employability (Brooke and Taylor 2005). Conceptually and empirically, a need exists to understand the bases on which managers make decisions about older workers’ access to developmental opportunities, including courses and further training, and those associated with advancement. The investigation reported here draws on the views of a small cohort of experienced senior managers to capture their perceptions about policies, understanding and practices in their organisations in relation to older workers.

Employer attitudes to older workers

Ageism is an historical and cultural phenomenon that is contextually specific, contingent and fluid rather than a form of discrimination that is natural or inevitable (Duncan 2008). For instance, in Confucian Heritage Culture respect is extended to elders through the sentiment of filial piety. Unfortunately, given the changeable and situated character of ageism, it is ‘pervasively elaborate’ and can take on overt or covert forms (Duncan 2008: 1137). Scrutton (cited in Duncan 2008: 1143) explains ageism embedded in social relationships and institutionalised through labour market processes as well as the wider economic context is ‘structural ageism’. This perspective is broadened and enriched by Chou and Choi (2011: 1052) who illustrate how ageism ‘occurs at various levels and takes various forms’, including both the institutional and interpersonal. Hence, ageism is not simply an abstract form of macro-level practice, but occurs in routine, intimate and often taken-for-granted interactions, and as such constitutes a dynamic and complex process of production, contestation and reproduction. As Riach (2006a) argues, ageism is likely informed and sustained by inaccurate perceptions of difference that lead to the subsequent marginalisation or ‘Othering’ of older workers. As such, ageism is not always direct or blatant but can take forms that are often subtle, invisible and difficult to prove. Ignorance, complacency and inaction are examples of indirect or covert discrimination that do not generate direct evidence or proof of ageism.

Despite recent governmental efforts promoting the benefits of older workers, employers are often not keeping pace with changes in the political, legal and demographic landscape. There remains a lack of human resource (HR) policies sensitive to older workers (Harris, Foster and Sempik 2011),

suggesting barriers confronted by older workers are largely unacknowledged, accepted or ‘invisible’ to employers (Riach 2006b: 1707). Yet, even the development and implementation of HR policy to both protect and attract older workers is no cure-all, particularly when there is not an active, strong and visible commitment to challenging discrimination. Without establishing and encouraging this sort of workplace culture, the good intentions of policies are likely to be undermined, due to multiple and shifting interpretations that can breed confusion, doubt, suspicion and resistance (Ball 2006: 45). Hence, even when equal opportunity policies are introduced to prevent and combat ageism, discrimination does not simply go away (Duncan 2008; McVittie, McKinlay and Widdicombe 2003). McVittie, McKinlay and Widdicombe (2003: 597) illustrate how HR managers and recruitment managers at 12 medium-sized and large UK organisations were ‘able to deploy a form of “new ageism” talk which enacted discriminatory practices against older employees and jobseekers while being rhetorically organised around a discourse of equal opportunity’. The emergence of this more subtle or implicit culture of ageism empowers managers tactically to ‘distance themselves from prejudice or politically incorrect opinions’ (Riach 2006b: 1705) within the boundaries of a ‘liberal tolerant’ (McVittie, McKinlay and Widdicombe 2003: 609).

Controversial both in theory and practice, ‘equality of opportunity’ is aligned to a normative conception of meritocracy in which the distribution of rewards is justified on the basis of individual achievement, competence, effort and ambition: *i.e.* they flow to those who have earned it. Yet, meritocracy is potentially blind to social differences including age. McNamee and Miller (2004), for instance, critique the notion of meritocracy underpinning the so-called American Dream in the USA (similar to the Australian belief in a ‘fair go’) by highlighting how it is mobilised to reproduce and defend inequality, *e.g.* through blaming victims. They argue:

there is a gap between how people think the system works and how the system actually does work. We refer to this gap as ‘the meritocracy myth,’ or the myth that the system distributes resources—especially wealth and income—according to the merit of individuals (McNamee and Miller 2004).

Thus, meritocracy as a powerful and largely unquestioned form of ideology—at both a macro and micro level—does not always hold up to empirical scrutiny. For instance, merit-based practices in workplaces, such as performance review, differentiate on the basis of gender and race (Castilla 2008; Castilla and Benard 2010).

Regardless of whether or not formal equal opportunity measures are in place, the research literature is replete with findings of and accounts about negative employer perceptions of older workers. A recent study in the

United States noted, for instance, that the effects of discrimination are also mediated by age, gender, education, occupation and wage (Chou and Choi 2011). Given the increasing diversity of workforces, the challenge here is to overcome the impact of cultural biases, or stereotyping, in the planning and decision-making processes of an organisation. Gringart, Helmes and Speelman (2005: 96) found that a sample of 128 'hiring decision-makers' in businesses of up to 50 employees were generally 'unlikely to hire older workers' because among other things, those workers 'were viewed as being less adaptable to new technology, less interested in technological change and less trainable, as well as being less ambitious, less energetic, less healthy, less creative and not as physically strong.' A review by Kossen and Pedersen (2008: 81) concluded that 'despite a large body of evidence on the productive value of older workers, and effort spent on promoting their worth... that many employers have remained reluctant to employ these workers'. Further, in a study involving almost 100 managers of Australian companies, Partridge (quoted in University of Wollongong 2009) concluded, 'that older men and women are less likely to be employed, promoted, or trained due to negative stereotypes associated with their age'. Similar conclusions were reached by Encel (2003), Jorgensen (2004) and Syed (2006), particularly in locations, sectors or periods of excess labour supply (Karpinska, Henkens and Schippers 2011).

Internationally, Keese, in summarising an OECD report on ageing and employment policies in 21 countries, including Australia, the UK, Japan and the USA, concluded that

... negative attitudes to older workers are still widespread, which is reflected in biased hiring and firing practices. Older workers are often thought of by employers as being less productive than the young. And rarely do they receive on-the-job training, so their skills can become obsolete. Some employers wrongly believe that older workers are not adaptable and are resistant to change. (2006: 2)

There seems little doubt from the literature that, in general, older workers face significant barriers to obtaining and retaining employment because of negative stereotypes and age discrimination, albeit those barriers are greater in the former than the latter. However, research focused on understanding age discrimination highlights the often ambivalent and ambiguous attitudes of employers toward older workers (Taylor and Walker 1998; Warr and Pennington 1993). For example, in a review of Australian research published between 1989 and 2000, Bittman, Flick and Rice found that:

... older workers are valued for their skills, experience, loyalty, corporate knowledge, commitment, strong work ethic, reliability, and low absenteeism. At the same time, employers regard older workers as less adaptable to change, less productive, hard to train, inflexible, less motivated, a risky investment and with potential poor health. (2001: 39)

Similarly, a US survey (Munnell, Sass and Soto 2006) found that although older workers are seen as more expensive, they were also seen as more productive, and a large majority of employers said older workers were 'as attractive' or 'more attractive' than younger employees. However, this management view was considerably weaker for lower-skilled workers. That is, more highly educated and skilled workers were seen as representing less of an employability problem than those with lower-level skills.

There are also differences in employer attitudes towards *retaining* older workers and *hiring* older workers, with the former being the focus of this study. As indicated above, Steinberg *et al.* (1996: 157) found that 'regardless of the perceived more positive qualities of older workers... employers appear to prefer to recruit employees in the younger age groups for most employee categories' with 'minimal interest in recruiting anyone over 45 years for any job... and no preference for anyone 56 years or older'. Yet, for currently employed older workers, there is some evidence that managers give priority consideration to 'personality and individual attitude' rather than to age (Ranzijn 2005). Unfortunately, this view does not always translate into employment practices such as hiring, training and promotion, and many older workers are stereotypically referred to as 'dinosaurs' or 'dead wood' who are past their use-by date when discriminated against and targeted for layoffs and redundancies during periods of economic restructuring and downturn (Gettler 2011; Wynhausen 2011). When pressed to increase productivity, Patrickson and Ranzijn (2005: 732) claim managers were unable to look beyond negative stereotypes of older workers and sought 'innovativeness and entrepreneurship – traits that are valued in today's economic activity – [and] are more likely to be assessed as being associated with youth'. This stands as an example of 'old' economic prejudices and erroneous stereotypes overcoming logical decision-making focused on long-term plans and vision. Ranzijn, Carlson and Winefield (2004: 567) point out that 'older workers may be more profitable, not less, since older employees may possess more of the "soft skills" which enable them to learn faster than younger people' and, therefore, represent a good return on investment, particularly given that they now live longer and are 'less geographically mobile because of family commitments'. In sum, whilst negative views of older workers are pervasive in the literature, it does seem that important differences exist toward the hiring and retaining of older workers.

Opportunities for training

The ambivalence in the literature is quite marked when it comes to training for older workers. In a review of European and UK literature on links

amongst age, training and employment, McNair, Maltby and Nettleship (2007: 6) identified two ways older people in the workforce are considered: (a) as one of a number of marginal groups of excluded people, in which training is intended to redress the balance, and (b) where the ageing of the workforce is part of a long-term transformation of the whole workforce, and training is related to work–life balance, transitions between work and retirement, and the intergenerational transfer of skills and knowledge. In Australia, Noonan (2007: 20) concluded managers are unlikely to invest in training older workers ‘except where they perceive a clear and immediate return or are required to do so for employees to meet occupational health and safety, regulatory or quality assurance requirements’. Karmel (2008: 12) similarly concluded that: ‘the market, if left to itself, is not going to support large amounts of training for older workers’.

However, there is also the matter of older employees’ attitudes to training. From an analysis of available literature, Wooden *et al.* (2001: 37–40) concluded that older workers’ attitudes to training were a ‘significant obstacle’ to their participation in it. The review of Chappell *et al.* (2003) served to confirm the finding of Wooden *et al.* (2001) that older workers generally believed they did not need or want more training. Noonan (2007: 20) cited evidence of resistance to participation in structured training by employees when: (a) they believe they already have the required capacities for their job; (b) because of competing pressures from work and family obligations or (c) where they cannot identify a return on their investment in time, course fees or lost wages if they receive little or no employer support. In sum, many older workers may view training programmes as being ineffective or unattractive means through which to develop further their capacities. Instead, there is evidence of preferred approaches premised on collaborative learning with peers and assisting others learn (Billett *et al.* 2011).

At the same time, Smith, Smith and Smith (2007) hold there is a dangerous tendency to ‘blame the victim’ and cite Barnes, Bimrose and Brown (2006) who urge that older workers should not be ‘pathologised’. Based on out-dated attitudes, such perception deficits fail to recognise that older workers are not a dependent and homogeneous group and that their participation as learners needs to be understood within a context of unequal educational opportunity that has affected access. Tones (quoted in Queensland University of Technology 2009) found mature-age workers were just as keen to learn as others in the workplace, but did not always have the same opportunities. She claims workers in paraprofessional and lower-level occupations reported fewer opportunities than those in professional roles, which is similar to findings of Billett *et al.* (2011).

Hence, within this context, McNair, Maltby and Nettleship (2007: 18) claim there is an unresolved debate about whether employee or employer attitudes are most responsible for the lack of training undertaken by older workers. They quoted McNair, Flynn and Dutton's (2007) suggestion that 'there is a degree of collusion between employers and employees in not encouraging training – with both taking the easy option to not bother to train' (McNair, Maltby and Nettleship 2007: 19). Given the salience of such decision-making and suggestions of collusion, it is important that the sources of this decision-making be understood more fully.

Overall, the picture emerging from the literature is generally one of employer discrimination against engaging older workers, ambivalence about their continued employment and a disinclination to provide training in the latter years of employment. All of this is possibly aided and abetted by employee reluctance, which may be of itself a statement indicating that their needs are not fully understood. Lower-skilled workers seem most disadvantaged when it comes to being hired or being trained when employed. Yet, evident across this review is employer bias against older workers that is premised on an apparent lack of managerial logic, that is, a lack of consideration of factors facing contemporary workplaces: ageing workforces and the need to continue to develop the capacities of the workforce.

Methodological approach

The data discussed below were gathered as part of a larger study in Australia across all the states and territories comprising interviews and surveys of older workers and their managers. Through the use of snowball or network sampling, we interviewed 12 individuals in paid full-time employment as managers and who held significant supervisory responsibility. Snowball sampling is a commonly used method of data collection adopted by 'outsiders' for populations that are typically difficult, elusive or 'hard to reach' (Atkinson and Flint 2001), including managers (Karpinska, Henkens and Schippers 2011). The researchers initially used personal and professional contacts and then their 'insider' knowledge and referrals to identify informants. The managers – six men and six women – were aged 45 or more except for one who was under that age, but responsible for supervising the training of a mainly older workforce. Their occupational roles were diverse, with three senior managers from a welfare organisation, two from the banking sector, and one each from a fashion store, a private secondary school (*i.e.* registrar), an accounting practice, and the training manager of an aged-care organisation. Two interviewees worked in senior

positions in universities: one each in administration and academic areas, another was a Chief Executive Officer of a cattle company. Ethical approval for the study was formally provided through the host university's Human Research Ethics Committee.

The qualitative design utilised semi-structured interviews supplemented by a self-report questionnaire that included items about the informants' age, educational levels and work history. Using the same interview protocol, the managers were asked questions categorised in three main areas: about industry and other changes that affected their workplace (*e.g.* 'In the work you manage, what are the key changes requiring workers to learn new things in order to remain current in their work skills and knowledge?'), about perceptions of 'older workers' (*e.g.* 'Are mature-aged workers treated differently than younger workers in your workplace in terms of: (i) opportunities to learn, (ii) opportunities for advancement; and (iii) security of employment? Please provide examples.'). and their attitudes about education and training and workplace initiatives associated with such workers (*e.g.* 'In what ways, does your workplace encourage and support workers engaging in professional learning of your choice?'). Many earlier inquiries have adopted large-scale quantitative procedures which tend to treat informants homogeneously with little concern for capturing the diversity of their view (Encel 2001), indeed aggregating their responses.

Given this situation, the method was directed to secure a deeper understanding of age discrimination in the workplace by illuminating the bases, and, to a lesser extent, the mechanisms, through which it is both legitimated and reproduced. This included the retrieval of critical incidents that expressed each manager's perceptions about older workers and the consequences of these attitudes on experiences and practices (*e.g.* 'Could you tell us about a recent incident where a worker aged over 45 learnt something new at work – doing something they had not done before'). Tripp (1993: 24) explains that a critical incident is a description of an event (or series of events) that is not necessarily 'dramatic or obvious: they are mostly straightforward accounts of very commonplace events that occur in routine professional practice which are critical in a rather difference sense in that they are indicative of underlying trends, motives and structures'. The meaning afforded to a critical incident renders it useful for exploring the beliefs, attitudes and behaviours that influenced the event as well as its explanation, impact or consequences. Taylor and Walker (1998: 68) suggest that the attitudes, values and competencies of managers responsible for day-to-day HR matters are potentially 'more significant factors in determining actual practices toward older workers than any formal, written policy'. With this in mind, the purpose of the interviews was to obtain rich data from the participants' lived experiences to unlock and peer inside the

'black box' model of cause and effect that might explain discrimination against older workers.

Data collection occurred between April and September 2009. Interviews were conducted in person, at a time and location selected by the participant, and lasted approximately 45 mins to an hour. The responses were recorded and transcribed verbatim, with the participants' informed consent. These data were analysed through a fluid and iterative process to identify key attitudes, policies and practices, and to explore the contexts and ideologies used to explain and justify their relationship. This included using qualitative analysis software NVivo, version 8, to identify significant, recurring or dominant themes as well as reading and re-reading the transcripts when coding them into distinctive categories and searching for patterns in the data. The rigour of the process was enhanced by two of the four team members acting as inter-rater reliability agents, separately reading the transcripts to identify potential themes related to managers' attitudes, policies and practices. They then compared their coding to reach a consensus, and then tested this consensus with the other two members of the team in order to clarify and justify the attitudes, policies and practices finally arrived at. This process of identification of themes met all four criteria suggested by Neuman (2000) as essential for seeing themes in qualitative data: recognising patterns, thinking in terms of systems and concepts, having in-depth background knowledge (in this case, by the team, collectively), and possessing relevant information. Overall, this process achieved what Gibbs (2002: 3) proposed is the purpose of qualitative research: to increase the bulk, density and complexity of the data.

A number of themes emerged in the study that were consistent with those already identified in the literature, including the lack of acknowledgement or rationalisation of ageism, the ambivalent and contradictory attitudes of managers toward older workers, the need for these employees to be adaptable or flexible to meet the ever-changing requirements of work and the belief that they should take some responsibility for managing their own learning, although opinion about who is primarily responsible for this learning is contested and tends to vary depending upon national context (Van Dalen, Henkens and Schippers 2009), size of organisation and sector. In our study, these themes were connected by an overarching theme linked to the normalisation of ageism in the workplace, that is, the ideology of meritocracy. In this context, ageism appeared to be culturally invisible, unacknowledged or denied. For this reason, a need exists for the ideological premises for exercising age discrimination to be elaborated as well as its consequences. The next section provides a summary of direct responses to the three main categories of questions in the interview schedule in order to illustrate the views expressed by the managers.

Managers of older workers: perspectives from interviews

In the following sections, interview data from managers about their considerations of changing requirements to work, the degree by which older workers are discriminated against, the kind of support that is available to these workers, the educational options for them and also the responsibilities of these workers are presented and discussed. Through this, instances of the logic of management decision-making are made explicit.

Workplace changes as stimuli for learning

The managers were first asked about key changes requiring employees to learn new tasks to remain current in their work skills and knowledge. In preview, all referred to all workers' need for constant learning for employability, and older workers were no exception. One informant commented that work is changing much more quickly than ever before and that careers are now 'truncated' and everybody is learning much more constantly. Nine of the 12 managers identified being competent with technology as requiring constant learning, including new hardware and software, and also occupation-specific applications, as being key work requirements. These included new equipment in aged-care nursing, electronic communication in the welfare field and the influence of new technology on teaching in schools. Half the informants also mentioned legislative or regulatory pressures, for example in regard to privacy and copyright in university administration, government legislation in the accounting profession, compliance with occupational health and safety requirements in the welfare organisation, and the changing policy context of higher education. Other triggers for learning were more industry-specific, *e.g.* new genetic developments in cattle breeding, and new research methodologies for university academics.

The informants were able to identify particular examples of their own new learning and those they supervise, ranging from short and immediately applicable learning to longer and more considered developmental learning. For example, for staff of the fashion store, learning to operate a new EFTPOS machine was realised through a ten-minute demonstration from a bank representative, which meant 'mainly commonsense, listening and following procedures'; the cattle company CEO learnt about new genetics technology direct from a consultant professional – the manager said: 'treat me like an absolute idiot – start from the beginning again'. At the other end of the scale, teachers learnt about new technology with one-to-one ongoing support over two and half years from two specialists; and food handlers in the welfare

agency learnt about meeting the requirements of legislation through a series of seven workshops (with the same trainer for consistency), experiential learning in workplaces, and with younger workers helping the older ones both to learn new skills and to see the need for the changes. Other examples of new learning included a financial team over four days talking through how to respond to clients after an economic downturn, nursing staff completing questionnaires about a new computer system, and a researcher applying existing knowledge to a new (community) situation. All of these instances suggest that these workers are capable of learning new tasks and understandings, and engage effectively with new technologies.

The reported triggers for learning had some commonality across workplaces, with new and upgraded technology a key feature, and also external influences in the form of government legislation and professional registration requirements. On the other hand, the examples of new requirements for learning illustrate the range of workplace needs and contexts these managers represent, ranging from the on-the-job learning in a small business to the systematic training of large numbers of staff in larger organisations. In all cases, however, the requirements for learning were aimed at meeting immediate needs of the organisation, whatever its size, and, hence, tended to be practical and relevant. None of the training was aimed particularly at older members of the workforce. Instead, managers took a largely reactive approach that was informed by macro-level developments relevant to their particular organisation and sector such as changes in the legislative and policy context (*see also* Karpinska, Henkens and Schippers 2011). In this way, these managers acknowledged that ongoing learning is essential for maintaining employability, including productivity and addressing immediate areas of legal and regulatory compliance in the changing requirements for workplace performance. Hence, these kinds of learning requirements stand as key goals towards which the logic of management is directed. The question remains as to whether older workers were viewed differently than other workers and this led to distinct responses by managers.

Different treatment

When asked whether they believed there were differences between the ways older and younger people in their organisation were treated in regard to opportunities to learn, opportunities for advancement or security of employment, the managers provided a range of mostly nuanced responses. Two stated explicitly there was no difference, as employees were treated individually on the basis of 'merit' and 'performance'. The fashion store manager expressed a preference for older sales assistants because of their

better work ethic and being closer in age to the clients. Only one manager claimed younger workers received preferential treatment both in terms of training opportunities and being groomed for promotion. On the other hand, this same manager proposed it was a 'waste of time' training older workers because they would not be employed long enough and that 'you don't have to be promoted to be happy'.

None of the other nine managers reported discrimination on the basis of age *per se*, but gave qualified responses, including four who suggested that younger workers were more willing to learn or more likely to seek out opportunities for learning and advancement. One manager proposed that some people use age as an excuse when they are not promoted.

Overall, none of the managers indicated there was age discrimination in relation to accessing training or promotional opportunities. Security of tenure was also not seen as an issue, and there was some agreement that younger people now tended to want to move jobs more quickly than the previous generation. So, these managers suggest that little overt discrimination exists in their workplaces against the aspirations and needs of older workers. Indeed, a few managers suggested that older workers are not as proactive in meeting the requirements to maintain their employability and advancement as younger workers. Some elements of the logic expressed here is that the workplace affordances are adequate and the key issue is older workers' engagement with what was on offer.

Support for older workers' learning

Several questions were asked about the extent of workplace support for older workers' learning including their own role as managers and whether the support could be improved. To some extent their responses reflect both the size of the organisation and the nature of the business. For example, all informants except the fashion store manager work in larger companies that had systems to support individual professional development and appraisals that occur annually (*e.g.* in university administration, welfare organisation) and/or schemes whereby employees can apply for funding to support work-related training (*e.g.* the school, the bank). From these managers' perspectives, workers were expected to be proactive in identifying their learning needs. In some instances, there was an expectation that people who went off to training would share what they have learnt on their return to the workplace.

Although the literature highlights the importance of creating an age-friendly workplace culture to foster continuous learning, most of the policies and strategies the organisations used were not age-related, *i.e.* they applied to all employees. When probed further about specific HR policy, one manager

suggested it would be discriminatory to do otherwise, and another said there was a 'huge focus on developing staff regardless of age'. Several informants made the point that workers' learning needs and support were related to their level in the organisation, *i.e.* the stage of their career, and not their age. Nevertheless, there were some explicit age-related comments, *e.g.* a welfare agency manager said they go out of their way to help older staff learn, and were sometimes 'overly patient', and that any decline in older workers was physical/health-related and not cognitive. Another manager commented on the need to keep older workers motivated to learn, and the nursing manager suggested that if semi-skilled staff stayed working longer because of the extended pension age in Australia (to 67), training may need to be 'shorter and sharper and more to the point'.

The managers interviewed typically saw their roles in the training process as being mentors and encouragers, with one noting the need to improve or 'fix' the self-esteem of older workers who had been in the same industry a long time. Only one manager had any training in supporting the learning of older workers, and that had been a unit of study on adult learning in a certificate programme. Thus, while the managers interviewed here wielded authority and influence in decision-making processes related to the identification and provision of developmental resources and opportunities, little or nothing was being done to increase their collective knowledge and awareness about best practice for older workers. While there was no specific or formal training, a bank manager stated that he was kept informed through:

... general communication coming out mainly through our HR area, just identifying I guess options and opportunities for ageing workers, and that's as much around workplace flexibility, part-time employment and any other options that are seen as suitable for an ageing worker.

A welfare manager also reported awareness of initiatives to support older workers outside her own organisation. She remarked 'We don't do anything special because we just regard everyone as the same in terms of employment, but I think a lot of organisations would spend a fair amount of time on that and that's with a flexible work pattern, job sharing, grandparental leave we're keen on – we don't have it, but some not-for-profits do'. So, it seems that efforts to support older workers, including the managers themselves, were largely *ad hoc* and voluntary.

In the discussion about support for learning, the needs of the organisation were prominent in the decision-making rationales. There were support strategies in all the large organisations, but in the implementation, the practices were more specific to each organisation, based on the sorts of employees, *e.g.* the approach of the welfare agency with its care workers, the

bank with its financial staff, as well as that of the fashion store manager. The managers' perceptions of the range of employee motivations to learn also came out in this section. So, the analysis of the interview data here suggest that there is no shortage of awareness of the need for ongoing development and opportunities for this development were available in the majority of the workplaces, albeit in some ways shaped by values and practices that were not always initiated by these managers.

As noted above, most of these informants stated that organisational training policies and strategies did not discriminate for or against older workers. However, a number of observations about workplace practices related to older workers, including some comparison with younger employees. One was the claim that it was 'refreshing' to have younger people come into an organisation with knowledge of new research and theories 'cause you can get a bit stuck in your ways'. Another informant, claimed the 35–45 age group was most responsive to training, 'perhaps because they've still got a good twenty years of working'.

Among other comments made were: that you get 'more bang for buck' from younger workers, that 'the trick to keeping older workers is to have some sort of career development' and to allow them to work less as they got older; that a move to part-time work has implications for the time available for training, and that in developing a work–life balance there was also a need to balance the workers' and organisation's needs; that distance education was good for older workers because 'I don't think they see themselves sitting in classes with a bunch of 22-year-olds', and also they could get support as a group in the workplace; that there should be free computer courses for people over 45 who have not had the opportunity to learn; and that in one large organisation only new employment opportunities would trigger new learning for older workers. Yet, so many of these statements were assertions: advanced without evidence.

The questions in this section of the interview schedule elicited diverse responses that helped illuminate the learning needs and attitudes of older workers as perceived by some of their managers. They began to differentiate between younger and older workers and commented on the older workers' responses to the training offered, and had diverse views on the nature of courses available. So, the logic exercised here was that perceived worth of educational achievement was likely to be differentiated by sector and age, and not an unassailable asset for older workers.

Responsibility for learning

The last item on the interview schedule was about employees' responsibility for learning. Of the 12 managers, eight claimed individual workers should

be totally or mainly responsible for their learning, although most of those also said it should be employer supported. Paradoxically, a welfare manager proposed older, less-educated workers sometimes need greater help or encouragement to undertake learning, whereas a manager in a bank said by age 45 employees should know what professional development they needed and the organisation should then support their choices. So, here the level of occupation and educational achievement enters the logic of what qualifies as expectations about employees' responsibilities for their learning. This is noteworthy given that innovations such as computing are likely to be broadly influential across a range of work activities. Yet distinct expectations about learning to remain employable are expressed by these managers.

There were also some related observations about the motivation of older workers. For example, one manager said that in moving to performance reviews, some staff found it difficult to regard themselves as taking the initiative in shaping their career within the organisation. Another said that long-serving workers sometimes choose not to move to a new position and so 'select themselves out of opportunities' and, consequently, find it difficult to re-position themselves. In fact, these few responses illuminate the complexity of this area, with some informants suggesting that the organisation would continue to employ older workers. This was the case even if they did not undertake further training, as long as they demonstrated competence, while others suggested older workers sometimes 'coast along' and may need encouragement to do more training – to 'maintain their competitive edge' with younger workers, as one manager put it. One said more bluntly that workers need to recognise they do not have an entitlement as a mature-age employee *not* to undertake training. In the fashion store, the manager noted once again that staff learning was ongoing and simply part of the business.

Discussion of provisions and engagement

The focus of this paper is to explore the attitudes that govern the relationship between managers and older workers in order to gain insights into the affordances and constraints that mediate, enhance or hinder their access to education and training. Certainly, our research supports earlier findings by Warr and Pennington (1993), Loretto and White (2006), Encel, Nelson and Stafford (2011) and others that the relationship between employers and older workers is both complex and contradictory. Although evidence of ageism or discrimination exists, the research reported in this paper found similar evidence of both positive and negative bias toward older workers. For example, the fashion store manager suggested that older workers represented a pool of talent for their work ethic and ability to deal with

mature people – something that their younger rivals lacked. This perception replicates findings in the literature about the positive attitudes of employers toward older workers in sectors where “a strong business case” exists for their recruitment and retention, *e.g.* retail and hospitality (Loretto, Vickerstaff and White 2007: 153). More generally, an extensive review of the literature by Guest and Shacklock (2005) illustrates that employers are interested in the changing value of older workers, particularly in terms of their personal qualities, skills and talents.

Tempering these findings, this positive bias detected in the attitudes of managers still constitutes a lumping together of older workers. Although the managers interviewed in this study tended to look past chronological age as a criterion for judging the potential value and contribution of older workers, a gap existed in perceptions of, and attitudes toward them as a homogenised group. For example, there were a number of stereotypical assumptions about the motivations, goals and aspirations of older workers, *e.g.* that older workers were less open to training when close to retirement. This is a sentiment echoed in the literature (Brooke and Taylor 2005; Loretto and White 2006) and was reflected in comments about the ‘trick’ of keeping older workers in employment and engaging them in learning (*see also* West 2010). Thus, even when productive, workers labelled as older may be deprived of opportunities to sustain their employability through access to education and training.

This labelling is a concern given that the majority of managers in this study identified the lifelong learning imperative of employees as being necessary to meet the different and rapidly changing requirements of work. Similar to research cited earlier, our findings complicate the idea that managers systematically or overtly discriminate against older workers in terms of access and support for education, training and promotion. The diversity of responses in our study indicates that the level of support varies according to the size of the organisation (McNair *et al.* 2004, cited in Phillipson and Smith 2005: 47) and business orientation (Phillipson and Smith 2005: 47). Additionally, opportunities for older workers to engage in skill upgrading and training can be also diminished by business difficulties or the costs faced by businesses (Pillay, Kelly and Tones, 2010). A number of contextual factors are, therefore, external to sustaining the employability assets of older workers such as employer attitudes and labour market demand (Karpinska, Henkens and Schippers 2011; McQuaid and Lindsay 2005).

However, our findings reveal a great deal of complacency still exists both in HR policy and practice. None of the managers interviewed in this study indicated that they were aware of training policies or programmes that discriminated either for or against older workers, which is comparable to a recent finding in the literature that reported a lack of ‘age awareness or

strategies to integrate workers of different ages' in four case studies of Australian and UK public and private-sector organisations (Brooke and Taylor 2005: 426). This gap raises the question of either 'policy reach' or the lack of long-term planning as part of a wider strategy (Harris, Foster and Sempik 2011). Here, ageism is a form of prejudice that is institutionalised in the everyday values, beliefs and practices of organisations that are blind to difference and yet continue to label certain workers as older in deficit terms.

To provide some interpretation and critical insight into such gaps and apparent contradictions we turned to relevant literature on workplace inequality that explores the alleged objectivity and neutrality of meritocratic workplaces (Castilla 2008; Castilla and Benard 2010). Indeed, meritocracy emerged as a strong theme in the study as evident in the discourse on 'merit', 'performance' and 'competency' that was linked to the managers' understanding of individual responsibility, equal opportunity and career development or training. We argue that the adoption of meritocratic principles along the lines of equal opportunity reflects a myopic view of the world that is complicit with the often hidden or invisible workings of age discrimination in organisations. A recent study by Castilla and Benard (2010) highlighted the contradiction of what they termed the 'paradox of meritocracy' in organisations, when managers showed bias assessing the performance of males favourably in comparison to equally qualified and performing women. Previous research also casts doubt on whether performance appraisal is meritocratic, revealing the way in which such mechanisms reproduce patterns of organisational inequality (Castilla 2008). Such findings are significant as they expose the cracks within the rhetorical veneer of a self-monitoring, self-evaluating and self-correcting managerial meritocracy.

Our findings also indicate that performance review or appraisal is a key merit-based practice used to analyse individual need and help inform the career planning of older workers. In Australia, performance management or appraisal systems were adopted in the 1990s on a widespread basis and are now commonly used to facilitate career-planning decisions (De Cieri and Sheehan 2008: 247–8). Given the consequences of past policy failure, our concern is that such practices are consistent with an individualistic and meritocratic view of the world that disguises and facilitates outcomes that are counter-intuitive, biased and counter-productive.

For employers, Smith (2009: 61) argues that the concept of employability is aligned with an individual's responsibility to acquire skills that allow for flexibility and mobility in an insecure labour market. Here, we see the logic of neoliberalism as applied to 'individually centred, supply-side' approaches to employability and adaptability, *e.g.* a focus on individual responsibility for life choices including personal investment in education and training (McQuaid and Lindsay 2004: 202). In fact, the view that employability is

primarily about individual attributes and is largely an individual responsibility has strong empirical support amongst the managers interviewed in this study. We suggest that this meritocratic ideal of self-improvement fails to acknowledge that employability has ‘interactive elements’ (beyond the individual) that are determined by a number of contextual factors (McQuaid and Lindsay 2004: 202; *see also* Riach 2006*b*).

As all of the above indicates, the logic of managers and employers needs to be adjusted in engaging critically with easy societal views and values and with the need to develop age-aware policies and practices to accommodate older workers (Eyster, Johnson and Toder 2009) within an inter-age context (Brooke and Taylor 2005). Given the inevitable comparisons with younger employees and the unique difficulties faced by different categories of workers labelled as older, the challenge is to address the passive and widely held belief that workplaces are neutral places and have managers consider age in both their policies and practices.

Indeed, Armstrong-Stassen (2008) claims there is still a lack of knowledge of how to develop and implement specific HR practices for older workers. Certainly, this was evident in our study. Consequently, an ongoing need exists to engage in open dialogue with all affected stakeholders as the basis for creating workplace contexts that promote the contribution of older workers. Guy and Newman (2010: 167) suggest: ‘Human resource management is the vehicle in each organization for changing power relations among groups of workers, leveling the playing fields, and providing equal opportunity for others, not just at the entry gate but at checkpoints throughout the organization’. Herein exists a key reason to develop effective workplace communication strategies and to educate managers and HR professionals who have front-line decision-making responsibility for performance management, succession planning and employee development.

Finally, taking a more holistic approach, the focus of an age-aware strategy should not simply be on challenging or changing the complacent or overtly discriminatory attitudes of managers. As Loretto and White (2006: 327) argue, it should also target the tendency of older workers to ‘discriminate “against themselves” by not coming forward for training or promotion’. This may be due to internalised ageism (age-self stereotyping) that undermines the confidence and self-worth of older workers. Often, negative self-perceptions of ageing and performance held by workers themselves are related to level of education (Reio and Sanders-Reio 1999). But these views are also manifestations of widespread and deep-seated insecurities, beliefs and attitudes at the heart of age discrimination in society.

In sum, maintaining the employability of older workers requires more than simply helping them to overcome personal constraints or deficits.

It requires a pro-active, dialogical, holistic, imaginative and flexible approach to policy and practice that acknowledges older workers are not a homogenous group and providing them with both opportunities and support. Here, is where the logic of management needs to change. Specifically, Loretto and White (2006: 328) noted earlier research that found, 'although most employers perceived older workers favourably, this did not often translate into positive action'. They argue that this lack of action constitutes a serious and unexplained 'enactment gap' in need of further investigation (Loretto and White 2006: 328). Building upon earlier research but adding some insight on the issue of older workers, we suggest that one aspect of this gap is the myth of meritocracy or the idea that equality of opportunity is distributed evenly across different groups in the workplace.

These findings have a number of important limitations. For example, the study relies on personal interviews as a primary method of data collection and therefore the problem of participant reactivity is introduced (Maxwell 1991). This may involve the interviewer encouraging the respondent to provide the 'correct' or 'right' answer by rewarding them through verbal and non-verbal cues. Conversely, interviewees may provide accounts that are premised on attempting to provide positive or 'socially desirable' responses, particularly on topics that are regarded as legally sensitive such as age (Posthuma and Campion 2009; Riach 2006a). Thus, research on the topic of age discrimination is overlaid with methodological challenges (Riach 2006a). To compound the situation, older generations or employers who are in regular contact with older workers are likely to view them more positively and this may have influenced the responses of the older managers (Henkens 2005). Moreover, given the reliance on interviews with this target population, we are not able to provide a holistic account of the processes producing age discrimination given, for example, the lack of an employee perspective. Finally, due to the small sample size, the findings of the study are not held to be or proposed as generalisable or transferable to a wider population. They might stand as bases to examine whether they are broadly indicative of managers' attitudes, policies and practices in similar organisations elsewhere, and how they might differ across cultural contexts. However, further research is necessary in order to appraise these bases.

Nonetheless, the preliminary findings identified some knowledge gaps and suggest that the status quo will prevail when nothing is done organisationally to challenge or upset beliefs, values and practices that are considered normative or common sense. As such, a critical theory and political economy approach to ageing offers to identify and critique contradictions within existing ideologies, relations and practices that

generate various forms of discrimination such as ageism. In this sense, the myth of meritocracy is problematic as its effects are largely unquestioned. Yet, the need exists for further research and empirical evidence to provide insights into the issue of age discrimination in the workplace and guidance on how to prevent it. Specifically, this should include longitudinal studies of different workplace and HR cultures to explore the logic that is deployed by management in Australian and other countries' workplaces. Alongside this, a need exists for mapping exercises to understand the different types of policies that relate to age (Harris, Foster and Sempik 2011; Parry and Tyson 2011). Further research is also required into managerial practices including different methods of evaluation such as performance appraisal (Castilla and Benard 2010). In particular, a need exists for understanding how methods of evaluation are potentially influenced by age and other interrelated factors such as gender, sexuality, ethnicity, length of employment, occupation and sector.

Managers, older workers and training

Despite all the warning signs from the literature and the small sample of responses discussed here, it seems that few workplaces are taking adequate steps to prepare for the projected challenges and opportunities associated with ageing workforces. Underlying the passivity and silence surrounding the issue of ageism are deeply ingrained preconceptions and biases that are often invisible to those who hold them. The danger here is that legitimising myths and ideologies such as meritocracy include allegedly benign but powerful taken-for-granted assumptions that cannot be addressed by legislation or policy alone. In this sense, ageism is a complex phenomenon that defies simplistic explanation and remedy. Even so, government has a key role in encouraging businesses to take the lead in developing age-aware policies. In the workplace, one of the most effective actions to sustain older workers and their employability is preventative – training and the need to develop age-aware HR policies and practices. This is where employers need to rethink their current approaches and be more creative and imaginative with an acknowledgement that older workers are not a homogenous group and that both the individual context and the local context in which individuals find themselves will impact upon their educational attainment within the workplace. Perhaps through such efforts to take age seriously, the logic that seems to inhibit employers and managers from facing up to key changes may change and, in doing so, provide more equitable arrangements for the increasing numbers of older workers who will be seeking to exercise and sustain their employability in the workforce.

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