

Learning among Older Professional Workers: Knowledge Strategies and Knowledge Orientations

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Abstract A growing body of research and policy focused on ‘older workers’ is attempting to address perceived concerns that older workers’ skills are declining, along with their participation in employment and in employment-related learning opportunities. The discussion here seeks to contribute to this research. Its focus is the learning of older professional workers, about comparatively little has been published. The article presents research conducted in Canada involving 60 personal interviews with older Certified Management Accountants (CMAs). This qualitative study was designed to understand older professionals’ participation in learning through their reports not only of when, how and why they participated in specific learning activities, but also through their stories of practice and work, their understandings of knowledge, and how they view themselves as knowers and as knowledge workers. The findings showed that older CMA professionals appeared to position themselves deliberately as knowers, performing particular knowledge orientations aligned with their work priorities, and to resent external provisions for and assessments of their ‘learning’. Four orientations appeared most prominently, which are here described as ‘consolidating’, ‘outreaching’, ‘re-positioning’, and ‘disengaging’. The concluding section argues that far from withdrawing from learning, these older professionals are particularly strategic in what, when and how they engage. In fact most are astute in employing diverse strategies and resources in knowledge development, according to the knowledge orientation they adopt in their practice. These understandings may suggest ways to more effectively recognise and support older professionals’ learning in organizations and professional associations.

Keywords Older workers · Accountant education · Professional learning · Continuing professional development · Knowledge orientations

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Introduction

Across Europe, the UK, and North America, the retention of older workers (50+) in the paid labour force has become a key policy focus (EU 2007; HRDC 2000; OECD 2006; UK 2006). Concern is typically linked to three main projections: shortfalls in the future availability of skilled labour; the overall “greying population” such that the ratio of older workers is expected to increase by 2015 to 1 in 3 workers (ESF 2010) alongside changes in state pensionable age; and concerns about older workers’ continued competency. In particular, concerns tend to focus on perceptions that older workers’ skills are declining, along with their participation in employment and in employment-related learning opportunities. Broader concerns about age discrimination and exclusion in the workplace have invoked policy measures to remove regulatory barriers preventing older workers from continuing their employment, and to enforce age-equity practices in workplaces.

The issue of older workers’ participation in learning seems to have arisen partly from an agenda of re-skilling to retain them in the labour market, and partly from a general emphasis on cultivating continuous learning in work organisations, influenced by knowledge economy discourses demanding multi-skilled technological, innovative, entrepreneurial and resilient workers (Gee et al. 1996, other). However this issue also no doubt is linked to a growing sense, affirmed through research findings, that meaningful learning activity that is recognized and valued in work organizations plays a key role in retention, integration and job satisfaction of workers, as well as in creating more reflexive, creative, integrative and humane work environments (Bratton et al. 2003; Fuller and Unwin 2005). Hence the questions have become, What is the nature of older workers’ conceptions of and participation in work-related learning, and how can their participation be increased? The few studies of older workers’ learning produced so far to examine such questions have created a mixed and complex picture, depending upon researchers’ conceptions of learning and work as well as their focus of inquiry.

When we narrow the focus to professional workers¹ we find a volume of studies tracing the learning of *early* career professionals, examining their development of coping strategies, processes of professional socialization and identity formation, transitions to new environments and so forth. However there are yet very few published studies specifically examining *older* professionals’ or late career learning. Yet professional groups are experiencing dramatic changes in their practices and knowledge that no doubt entail many sorts of learning – new regulatory regimes controlling practice standards (Kuhlmann et al. 2009), new managerialist focus on audit and measurable outputs (Evetts 2009), proliferating knowledge sources (Nerland 2010), new co-production arrangements of practice (Lee and Dunston 2009), and so forth. Some professional groups have expressed real concern about the increased average age of their members alongside decreasing new recruits, suggesting professional shortages in future. Surely the learning of older professionals, both in terms of their ongoing adaptation to these changes and their retention in the

¹ As Evetts (2003) and others have argued, defining ‘professional’ has become a rather fruitless pursuit given the proliferation of practitioner groups seeking recognition as professions. For purposes of this discussion, a profession is distinguished from other vocational practices as a formally organised community bonded with distinct, formally educated knowledge, whose members’ standards of practice and knowledge are regulated both internally and externally.

workforce, and the relation of learning to that retention, is an important area for investigation. What knowledge do these workers value most, and what is their general orientation and approach to professional learning in the face of increased demands for continuous learning? To explore this question, we need to go beyond a simple focus on 'learning' to appreciate older professionals' specific engagements in and conceptions of their professional practice and work. These engagements are likely to be influenced by multiple dynamics including career history and organisational culture, but also by contextual pressures on professional practice such as changing arrangements of practice, knowledge requirements, regulations, and economic conditions. Ageism and age-related dynamics may also figure, but an analysis would be far too simplistic to focus simply upon how age may (or may not) influence workers' approaches to learning.

The study presented here was designed to understand older professionals' approaches to learning through their reports not only of when, how and why they engaged in specific learning activities, but also through their stories of practice and work, their understandings of knowledge, and how they view themselves as knowers and as knowledge workers. The study was set in Canada and the population of focus was Certified Management Accountants (CMAs). The CMA group was chosen because, like other professionals in the financial sector, they experience particular pressures to engage in continuous learning throughout their careers, assessed annually, to maintain a high level of skill and skill adaptability in face of rapidly shifting financial regulations and industry restructuring. The study involved 816 responses to a survey of CMAs about older professionals' learning strategies and preferences, and 60 personal interviews with older CMAs.

The article proceeds in four sections, beginning with conceptions of professional learning and older workers. The second section describes the methods and population of the study. The third presents findings showing older CMA professionals' approaches to learning, which may be better understood as their preferred strategies and resources for generating the knowledge they consider to be most valuable in terms of their overall practice in particular situations. In fact, they appeared to position themselves deliberately as knowers, with particular knowledge orientations aligned with their work priorities, and to resent external provisions for and assessments of their 'learning'. Four orientations appeared most prominently, which are here described as 'consolidating', 'outreaching', 're-positioning', and 'disengaging'. The concluding section argues that older professionals employ distinct positions, strategies and resources in knowledge development, according to the knowledge orientation they adopt in their practice. These need to be recognised and supported by employers, and understood by those entrusted with continuing professional development involving older workers.

Conceptions of Older Workers' Learning and Professional Learning

The category and definition of 'older worker' is troublesome, as Roberts (2006) has argued, partly because it makes little sense to abstract one age group from the intergenerational mix of work and knowledge activity to study in isolation. However given the current policy emphases on older workers, the category is important to retain if workplace research is to contribute to these policy debates.

For this study, an ‘older worker’ is defined simply as 50+ years of age, following the delineation adopted in Europe and Canada (EU 2007; HRDC 2000). In studies examining older workers and their learning, three inter-related issues have been raised: ageism; perceptions of older workers’ insufficient competency; and lower participation in learning. An important caveat deserves emphasis here. Almost all of the available studies are based on populations of non-professional, non-managerial older workers: those employed in manufacturing, hospitality, transport, security staff, and the like. It is difficult to ascertain the extent to which these findings, and the policy responses they provoke, can inform analysis of older *professional* workers. However both the broader societal issues and the ideological tensions illuminated in a comparison of these studies are very useful in approaching any research on older workers, particularly for pointing to the assumptions and contextual embeddedness framing the findings.

Some studies have focused on ageism in the workplace. Their evidence has raised concerns that age-related discrimination and discourses of ‘decline’ and obsolescence have generated negative stereotypes and ultimately, devaluing of aging workers by colleagues and employers, constructing them as ‘problems’ taking up jobs and resources (Ainsworth 2006; Carroll 2007). This ageism may function in very subtle ways, to the point of invisibility for many workers including those 50+. Or, it may only materialize clearly at the point of recruitment and selection, as Weller (2007) argues, where most of the 33 interviewees in her study claimed to have experienced age discrimination in some form in their search for employment. It also is likely the case that age is viewed differently in different vocational sectors, or different organisational settings. Ainsworth (2006) shows, for instance, that older workers are perceived as more acceptable in some professions such as law than in others such as the high tech industry. But stated views and everyday practices are, of course, not necessarily consistent. A body of research has accumulated showing that even in cases where organisational rhetoric praises traits such as reliability, personal maturity, stability and punctuality that are assumed to characterize older workers, in practice what are valued and rewarded are the flexible dynamism and technological competence associated with younger workers (Riach 2007; McVittie et al. 2003). A study by Lyon et al. (1998) argued that managers may suspect older employees of not performing the desired values of worker flexibility and organisational change, and perceive them as serious barriers to achieving new goals of business strategy.

And what of the governing work ideologies that shape perceptions of older workers? Sennett (2006) is among those who argue that in relations of ‘new capitalism’, workload and work pace have intensified, job stability and loyalty have declined, and work priority has shifted to customer service and building competitive networks. Older workers’ learning has become a particular policy focus through a perception that their qualifications become obsolescent and inadequate to permit entry to new employment (Porcellato et al. 2010), but this perception needs to be framed critically against what sorts of capabilities have become most valued in new capitalism. Continuous learning in the workplace has become a moral imperative, where learning is represented often uncritically as a requirement for all workers in a fast-changing technologised knowledge economy emphasizing innovation, entrepreneurship and resilience (OECD 1996). Yet, as Billett and van Woerkom (2008: 336) show, ‘the evidence consistently suggests that across Europe, employers are far more likely to

spend funds on training the young and well-educated, rather than on older workers. Concern over this inequitable training provision has sparked policy responses such as what we see in Canada, where this study was conducted, whose national Human Resources and Skills Development department launched a major Targeted (training) Initiative for Older Workers (HRSDC 2007). This is similar to the policy responses described by Pillay et al. (2003) driven by a perception that older workers need to acquire technological skills and capacity to adapt to changing workplaces.

The problem here is not only the uncritical uptake of assumptions that older workers should obediently adapt to structures of new capitalism, rather than, say, to work around them or find spaces of resistance. A further problem in such policy rhetoric is the conceptualisation of workers' learning and skill development within rational assumptions of human capital accumulation. These assumptions often fail to account for the non-linear, participative processes that are now widely understood to characterise workers' learning (*inter alia*, Billett 2002; Bratton et al. 2003; Hager 2004; Hodkinson et al. 2008). The work of Eraut (e.g. 1994, 2004) has for some years argued for the complex range of work activities, modes of cognition (reflex, intuitive, and deliberative), knowledge-generating processes, and forms of knowledge (such as personal knowledge, academic knowledge, role performance, task performance, judgment, teamwork, etc.) involved in learning in and for work. Many recent contemporary studies have also demonstrated that work-related learning is interwoven with individuals' identities and desires as well as the social relations and cultural-historical dynamics of particular communities, discourses and activities (Evans et al. 2006; Rainbird et al. 2004). In particular, older workers' learning is not often very well understood and therefore not always appropriately supported – indeed, as Weller (2007) showed, older workers say they encounter direct barriers to learning opportunities. One European study of 27 small-medium enterprises in England, Finland and Norway found that while both older and younger workers are challenged by the same changes in working life, technology and workplace structures, older workers' learning is not acknowledged or developed to the extent of younger workers (Tikkanen and Nyhan 2006). Similarly in Canada, researchers found that training opportunities and resources for older workers varied greatly by sector and specific organization (Fourzly and Gervais 2002). Older workers were more often called upon to mentor younger workers than to participate in learning opportunities themselves. These studies call for more awareness of older workers' learning needs, greater recognition and valuing of their strengths, and more inclusive support of their lifelong learning in the workplace.

In comparing companies in the UK, Fuller and Unwin (2005) showed that older workers' attitudes to learning and uptake of opportunities for meaningful workplace learning depended very much on the way that these opportunities were embedded, supported and managed within a wider culture of workforce development. Among older hospitality workers in particular, Canning (2011) found that their learning is best supported and their contributions to the organization maximized by *valuing* their experience and emphasizing team building. That is, instead of emphasizing older workers' acquisition of new skills, organizations should focus on utilising the skills that older workers have already developed, within arrangements of collaborative practice and opportunities for informal mentoring. However older workers' participation in learning also appears to depend on their own beliefs about knowledge.

Pillay et al. (2003), in studies of hospital administrative/security staff and transport workers, concluded that more older workers held 'low level' conceptions of learning, viewing work as a routine job and learning as acquiring skills to survive – beliefs which the researchers noted were inconsistent with a workplace culture of knowledge generation and critical reflection. Billett and van Woerkom (2008) examined similar phenomena of older workers' 'personal epistemologies' among six health care workers in a psychiatric clinic, but differentiated them according to their performance ratings as high or low. While both groups engaged in critical reflection for learning, Billett and van Woerkom observed that the 'low-regarded' workers focused their learning more on simply maintaining their practice rather than upon goals valued by managers – goals echoing knowledge economy discourses of innovation, continuous knowledge development and so forth.

These results all are certainly mixed, and suggest that older workers' different engagements in learning cannot be analysed productively apart from vocational cultures, the nature of work activity/knowledge, broader discourses establishing what knowledge counts most, and the changing workplace structures and relations of 'new capitalism'. Overall, researchers have raised a collective call for nuanced and differentiated research to understand how older workers themselves understand and approach learning. Learning itself needs to be understood as embedded within particular work practices, knowledge traditions and environments. Perceptions of older workers' knowledge and competency are often shaped by dominant economic discourses that individuals should learn what is needed to adapt to what work organizations want.

Turning to professional groups, the issue of older workers' learning has not yet begun to attract much attention beyond the aforementioned study by Billett and van Woerkom (2008). Therefore it is difficult to know the extent to which these three dimensions of ageism, perceptions of older workers' insufficient competency, and lower participation in learning, so prominent in studies of vocational workers discussed, apply to cases of well-educated professionals. In any case, professionals' learning is particularly interesting given the rapidly changing knowledges and professionalisms reported in a growing body of research (*inter alia*, Evetts 2009; Guile 2010; Nerland and Jensen 2010). Individuals are pressured to become more flexible and entrepreneurial to adapt to radical shifts in public demands, a decline in professional authority and discretion, and sharp drops in institutional resources (Evetts 2003). External accountability requirements and managerial regulation of professionals' autonomy have increased alongside proliferating new knowledge resources and technologies. Emphasis on professionals' continuous lifelong learning is growing, and increasingly audited through assessment of professionals' annual participation in learning activities to meet a minimum standard (Author 2009). Stronach et al. (2002) show how public service professionals juggle these different discourses simultaneously: the 'economies of performance' and the 'ecologies of practice', in everyday work that reflects multiple performances of identity and professionalism. In general, Evetts (2009) argues that professionalism is shifting more to an organisational orientation and away from an occupational professional allegiance. That is, professional practices and outputs are increasingly determined more by organisational demands and measures and less by the professional disciplines and community. Expectations for inter-professional collaboration have increased, demanding new

knowledge through ‘co-production’ work (Lee and Dunston 2009), and new competencies in ‘relational agency’ (Edwards 2007) to build common knowledge across what Nerland and Jensen (2010) refer to as professionals’ ‘epistemic communities’. In fact Nerland (2010) argues that *knowledge* dynamics need to be foregrounded in professional practice in terms of knowledge resources, ties and strategies.

These forces and their consequent tensions affect all professionals, but perhaps particularly those older professionals who may be expected to lead and mentor others through such changes, as well as to adapt to difficult new demands without the same developmental support and understanding extended to their younger colleagues.

Study Methods and Population

The study, conducted in 2008–2009 in Alberta Canada, focused on professional Certified Management Accountants (CMAs). While the overall research employed a survey of over 800 and interviews with 60 accountants, the discussion here focuses mostly on the interview data. CMAs are a university-educated, self-regulating professional group flourishing in Canada, the UK and elsewhere whose practice straddles two distinct bodies of knowledge: accounting and managing. The study aim was to examine the professional learning approaches and challenges experienced by older CMAs, and to explore their conceptions of their own knowledge and skill value as ‘older’ professionals. We defined ‘older’ CMAs as ‘50+’, following the working definition of recent major EU research initiatives focused on older workers (EU 2007). As was noted earlier, CMAs like most professions enjoy certain privileges of status and recognition, specialised knowledge, collective occupational identity, and some autonomous regulation. We were aware that such characteristics could influence the impact on CMAs of dynamics observed among older workers in other non-professional occupations such as age-related discrimination, perceptions of older workers’ insufficient competency, and lower participation in learning. At the same time, we were alert to the possibility that professionals like CMAs could experience different sorts of challenges and pressures related to age, precisely due to their professional positioning.

The Case of CMAs

The CMA group seemed particularly appropriate for a study of professional learning for four main reasons. First, these accountants are continually subject to massive changes presumably requiring constant learning: national regulations in tax structures, international financial regulations, and new IT systems. They also appear to experience relatively high occupational mobility, partly related to both organisational restructuring and the nature of CMA career trajectories. Their jobs can move across highly diverse sectors ranging from heavy construction or oil and gas to government or retail, and across highly diverse roles ranging from financial systems analysis to senior management, all demanding specialist expertise. Second, as a related point, CMAs practice in a wide diversity not only of industrial sectors and specialisms, but also in size and type of organization including large multi-national corporations, large public sector bureaucracies, small and medium enterprises, project teams, and

sometimes in professional accounting firms. All receive the same pre-service professional education for their CMA designation, but then must learn the required knowledge and skills to practice effectively in these varied environments. Third, more often than not, CMAs do not work with other CMAs: many firms or organization units would hire only one as Controller. Therefore, common models of professional learning including professional learning communities, legitimate peripheral participation in a 'community of practice', or organisation-based mentorship and training do not necessarily apply easily to CMAs. Fourth, the CMA Association in Canada, like that in the UK, had introduced a continuous learning requirement for all members. To retain their certification, Canadian CMAs must participate in a minimum of 120 h of professional learning activity over a three-year period, with a minimum of 30 h annually towards the 120 (CMA 2000).

Given the potentially important influence on professional continuous learning exercised through this policy, it is worth examining its provisions a little more closely. In regulating what counts as 'professional learning activity', the CMA Association declares itself to be 'very flexible'. 'Verifiable' activities include conferences with receipts, presentations with slides, courses with reportable grades or certificates, while non-verifiable activities that may be reported include reading professional journals, doing web-based research, and mentoring others. Members must retain a log and evidential documentation of these activities, and submit to the association an 'annual declaration' indicating compliance with the policy along with their annual membership fee. The Association may 'audit' a member at any time to check the logs of specific activity participation. In choosing activities that the Association deems relevant to professional learning, accountants are encouraged to use the CMA Competency Map as a guide. This map presents six 'functional' competencies for the professional CMA (strategic management, risk management and governance, performance management, performance measurement, financial resource management, and financial reporting) and four 'enabling' competencies (problem solving and decision making, leadership and group dynamics, professionalism and ethical behavior, and communication).

For our own purposes of studying older professionals' learning, CMAs offered an additional advantage as a focus of inquiry. In Alberta, Canada, where we conducted the study, the CMA Association perceived that a high percentage of its members were older than 50, with some located in remote regions without easy access to professional development opportunities offered through the Association and other agencies. The Association was particularly concerned to understand the 'learning needs' of its older members and how these might be better served by CMA-Canada. The Association assisted the study by distributing our emails and making the survey available to its members, but the study itself was funded by a government-sponsored funding agency The Canadian Council on Learning.

Study Methods

Interviewees were elicited through an electronic survey that was made available, through the CMA Association, to all certified Alberta CMAs regardless of age (5,487 members). Survey data focused on issues of professional learning in and for work: how, what, where and why individuals engaged in professional learning. A total of

816 participants chose to complete the survey, and survey respondents were invited to contact us to volunteer for an in-depth personal interview about these issues if they were 50–65 years in age. A total of 117 volunteered, and we selected 60 (32 women and 28 men) to represent a range of experiences in participants' years of experience and current employment (sector, organisational size and type). This high number of volunteers was truly surprising, both to us and to the CMA association. Two-thirds of the sample were aged 50–54, fifteen were 55–59, and five were 60–65. One-third worked in large businesses (engineering, law, construction, insurance, forestry), one-sixth in different multi-national oil and gas companies, and one-sixth in government departments (municipal, provincial and federal). Of the remainder, six individuals were instructors in post-secondary institutions, five worked in not-for-profit organizations, two in large banks, five were independent consultants, and two were unemployed. Almost 70% of the men were managers in managerial (e.g. Controller) or senior management roles such as Vice-President of Finance, compared to 45% of the women, of which only half were in senior management roles.

One semi-structured personal interview with each participant about 60 min in duration was conducted in a setting chosen by the interviewee, usually in a work or home office. After eliciting demographic and basic career history information, we asked each person to describe their current workplace context, its unique characteristics, their everyday activities and responsibilities, and the people with whom they interacted most. Then participants described key changes in their career path, from a time they specified as completion of early career to the present, in terms of their work roles and practices, the knowledge and expertise that they believed to be most valuable in performing these practices, the strategies that they employed both within and outside of work practices to develop this expertise, and the support they valued most. Question probes led interviewees to describe contextualised narrative examples of their present work practice, its challenges, and their knowledge-in-use, as well as when and why they developed new knowledge and with what strategies. Finally participants were asked to reflect on any distinctions between the kinds and processes of knowledge development they now pursue, in their present work context, from other key phases in their career history. Clearly a limitation of this study, as with all interview studies relying upon volunteers, is that it may only have attracted respondents who have particular interest in, opinions about, or time to reflect upon the study topic – in this case the relations of age to work and learning. Non-respondents may act and think in patterns not reflected in the following discussion. Beyond this speculation, there is little conclusion that can be responsibly advanced about differences between volunteers and non-volunteers.

All interviews were transcribed verbatim and any identifiable data relating directly to the interviewees were anonymised. Content analysis of transcripts was conducted manually in a process involving three researchers, two of whom had conducted the interviews. After a general reading/listening to a group of transcripts, a researcher coded each transcript in that group for themes and issues prompted by the research questions, the literature review, and unique participant characteristics. A small selection of transcripts were coded independently by two researchers, who then cross checked the themes and issues to create a synthesis and a larger set of themes as resources to assist the further coding. Then we prepared a brief (3–4 page) summary of each interview. It

provided key details of the work context, the participant themes coded by the researcher, key ‘small stories’ or critical incidents, and the researcher’s issues and questions raised by the transcript. In a set of meetings among the three researchers, these summaries were then compared critically. We analysed the nature of similarities and differences among the participant themes, and compiled a large matrix of common themes and outliers linked to work contexts and career trajectories. We also together re-examined the small stories, and the issues/questions, in light of the emerging thematic matrix. Here is where we began to discern idiosyncratic orientations and some internal contradictions among the individual participants that did not reconcile into universalised themes. At this point we developed a range of themes across different possible categorisations, and we returned to our research questions to select the most relevant dimensions to analyse across these categorisations. The participant summaries were then read across this new analytic matrix to eventually develop the four orientations shown here. The themes and their implications were presented to the CMA Association in a written report and made available to the CMA membership, the acceptance of which provided some assurance that the findings reflected members’ understandings of the phenomena.

Knowledge Strategies, Positionings, and Orientations of Older CMA Professionals

The analyses of the interviews revealed overall that most respondents were enthusiastic and sophisticated in their approaches to learning. Age-related discrimination figured only minimally, and appeared related to gender: two interviewees, both women over 55, described difficulty finding new employment which both ascribed to gendered ageism. However gendered work conditions did not emerge implicitly or explicitly again in the remaining interviews, nor was the study designed to focus on or theorize gender. Of interest to the present discussion which focuses on learning-related issues, interviewees could recount no personal experiences of exclusion, however subtle, from learning opportunities. What they talked about most were the *strategies* and resources they used to access new knowledge, as well as how they *positioned* themselves as knowers – both relative to others in a work setting, and in terms of their own career trajectory and related knowledge priorities. In the latter dynamic, we discerned different distinct *orientations* to knowledge development adopted by older CMAs. While affected by various personal and organizational factors, their knowledge orientations – like so much of their professional learning – appeared to be developed deliberately and strategically. These three major themes, learning strategies, positioning as knowers, and personal orientations to knowledge-generation among CMAs (hereafter ‘accountants’), are discussed in turn in the following paragraphs.

Knowledge Strategies and Resources of Older Accountants

Among older accountants that we interviewed, most viewed continuing professional learning as a fundamental responsibility, even a pleasure, and an important

part of their organizational roles. All indicated that they drew from wide-ranging knowledge resources, most of which were informal (unplanned and rooted in everyday activity). They readily identified moments and events as ‘learning’ activities that are not often recognized as such by workers: hallway conversations, surfing the web, solving problems, meeting informally with colleagues, and so forth. Only five interviewees referred to CPD sessions offered by the CMA associations as helpful: others described the content as too general or basic for their needs, using methods they didn’t find useful. Interviewees were quite clear, for instance, about whether or not they learned effectively through ‘network’ gatherings. Most had also developed strategies and confidence to access less evident knowledge sources. One had created his own learning network, another had sought out webinars hosted by different financial agencies, and several were sufficiently confident to contact knowledge elites directly:

If I need information, I go to the experts on the subject. So, take carbon capture and storage for instance. Go to the expert to find out, you know, where can we capture this stuff and, you know, where can, where could we possibly store it? Who is going to build the pipeline and how do we go about doing that?

Overall, it became clear that advanced accountants – which described most of the interviewees - felt, or expected to feel, personal control over how, when, and for what purposes they engaged in learning. They also expected to use knowledge resources and strategies that they believed worked best for their own needs at specific times.

I’m choosing to learn, whereas 10 years ago others chose. This is what I do for a living and these are the areas that I need to improve to better do what I’m doing. I’m actually learning more than when I was working years ago ... because what I’m choosing to learn is related to what I’m doing, it’s more specific. Right now I’m more in control. (man, controller of small tool business, 50)

Positioning as (Older) Knowers

This expectation of exercising control of their learning is perhaps obvious given the ‘controller’ positions that so many occupied. But beyond the influence of professional role, these older professionals seemed particularly strategic and deliberate in focusing their endeavors to develop knowledge. Most appeared to have positioned themselves as knowers, and to be confident in this position: expert on some things and weak in others, but concerned only with mastering what they had identified to be immediately important:

I’m totally out of touch with accounting ... sophisticated modeling is definitely something I’m not learning. I’m not quite sure if I have the inclination and the energy to even learn that stuff. But that is an area that I’m kind of I’m weak in ... [what’s important to me is] to keep abreast with what is happening out there, for instance on the climate change front. Like, so I need to know how the Europeans are thinking about it. How the Japanese and Australians are thinking. How the Americans are thinking and this is where the reading becomes critical, right? (man, senior business advisor, large oil and gas corporation, 58)

This concern became most evident when interviewees described the external assessments of their learning conducted by the CMA Association. All but three of the 60 expressed strong resentment about being treated as ‘learners’ rather than respected as knowers who are in control of developing their own knowledge.

The constant logging learning activities is onerous I’ve got enough paperwork and files. That’s the last thing I’m going to think about before I go home at night. It takes away from what you assume is something that is part of your professional obligation anyhow (man, chief accountant, pulp mill, 56)

They treat you like a school kid a bit. I suppose that’s an old guy thing. I don’t like being treated like a school kid. (man, manager large chemical firm, 59)
Here I am and I’m advancing and people respect me and they really want me to do their work and yet I still have to prove that I’m learning. It seems kind of weird. (man, systems analyst, international concrete manufacturer, 57)

These statements are reminiscent of Boud and Solomon’s (2003) contention that workers often resist being characterised as learners because the identity of ‘learner’ in work is not compatible with being regarded as ‘competent worker’. Among these accountants, this issue perhaps is exacerbated by a certain expectation, as older professionals, that their years of experience, professionalism and knowledge development be recognised. They clearly expected to be trusted, as knowers, to assess and direct their own needs for further knowledge development.

Personal Orientations to Knowledge Development among Older Accountants

Looking more closely at this broad theme of older professionals positioning themselves as *knowers* exercising control over their learning strategies and focus, clear distinctions began to appear among them. That is, individuals’ stories suggested that they envisioned themselves as adopting particular knowledge orientations. Knowledge development orientations are not ‘personal epistemologies’ in the way that Billett and van Woerkom (2008) conceptualized older workers’ learning, as described earlier. Instead, these are more like stances oriented to particular purposes of knowledge engagement and employing particular strategies and accessing particular knowledge resources. These knowledge orientations were not clearly linked to any specific sectors of work or specific forms of professional practices or roles. Instead, these orientations appeared to reflect different ways that older professionals, often with many years’ experience of practice, career and knowledge development, position themselves relative to the continuing onslaught of information and change alongside their sense of shaping a late career stage as employed accountants. Four distinct orientations were identified among the interview transcripts, which have been named here *consolidating*, *outreaching*, *redirecting*, and *disengaging*. These are not to be taken as some sort of typology into which individuals are categorized: they are neither characteristics nor career stages. Instead, they are meant to suggest the sorts of diverse orientations that professionals believe themselves to be enacting at particular moments of their unfolding careers and beliefs about learning.

Consolidating

One orientation to learning reflected among older accountants could be described as a 'consolidating' approach. Particularly apparent among about 32%² of the interviews including both men and women, this orientation suggested desires to deepen and focus what one already knew, rather than seeking new information or developing new specialisms.

All I need to do is keep myself aware of changes in the areas that are relevant to my clients. So instead of continually increasing and adding new knowledge and skills as I would have done and did do 15 years, 20 years ago now I'm simply broadening the knowledge base that's relevant to me at this point (woman independent accounting practice, 52)

Individuals that reflected more of a consolidating orientation seemed to be particularly strategic, choosing knowledge according to what they needed at that particular time to consolidate their expertise. More than any other orientation they described themselves as 'focused', or as 'being choosy'. One woman, a 52-year-old government administrator who had been a practicing accountant over 21 years and four job changes, reframed her focus in professional learning as being more about 'practicing what I've learned over the years'. She talked about consolidating and deepening her existing knowledge base, 'honing the quality', instead of attempting to learn new knowledge. Some described a careful parsimonious approach, 'learning according to what the project needs' or 'just learning what's needed to keep up'. There were references to the need to focus selectively, given the overwhelming demands and information.

One of the problems that I actually struggle with is how much we have coming at us, so to try to sort that out as to what is important and what isn't. It's just impossible to take it all in. And so part of my learning now is learning how to figure out what I actually need and to pay attention to that and let the rest go. (woman senior manager for international chartered accounting firm, 60)

A 'consolidating' orientation to knowledge development appeared to be directly related to a late career stage. For these, there was a sense of settlement, of confidence in one's own interests and one's right – indeed one's necessity given the increased awareness of the limits of time - to choose and focus what knowledge to develop.

Your time becomes more precious. You're more aware of where you want to spend your time. I think that you're less interested in career development and growth. You really want to just target in on the things that you're interested in. So when I was younger you kind of wanted to touch everything because you're not really sure ... then when you get to a certain point it's like, oh you know what, I really like this area and this is where I want to focus and this is where I want to go. (man, vice president of finance & administration, insurance, 52)

² While representation of responses as percentages is not particularly consistent with conventions of qualitative research, some readers seem to prefer to see relative proportions in categorisations, however provisional the categories are meant to be.

Outreaching

A second learning orientation, in some ways representing an opposite movement to consolidating, was what could be characterized as ‘outreaching’. It appeared particularly strong among about 23% of the interviewees. Rather than deepening and extending the knowledge they have already developed, these professionals expressed desires to reach outwards to seek new challenges and engage new ideas, even new fields. Older accountants whose learning descriptions reflected an outreaching or divergent orientation described themselves in terms of ‘stretching’, ‘insatiable’ for new knowledge, and ‘learning what’s of interest to me’. A woman Chief Financial Officer for a large health not-for-profit organization, 50 years of age, described a wide variety of learning pursuits as tied in with her own attitude of energy, ‘following what’s interesting, what I feel like doing . . . I’m not dictated by what’s needed for my career’. A particularly enthusiastic example was a 56-year-old man who had worked for the federal taxation office for 28 years and was planning to retire in 2 years and open an accounting consulting practice. He had recently begun a postgraduate degree in business, but was also undertaking other courses in computer-assisted auditing for personal interest. He went on to list other passionate interests that he pursued through learning activities in Chinese, yachting and photography.

Two individuals who were currently unemployed also described their orientation to learning in terms of seeking challenge and ‘stretching’. One, a 58-year old woman described herself with ‘an insatiable appetite to learn’, but feeling that sometimes she was ‘unable to pull together knowledge’. The other, a 56-year old who had been made redundant from a large bank and actively seeking work, was in the meantime enjoying seeking ad-hoc learning opportunities through volunteering on different boards, contracting with health care, and attending arts lectures. Beyond these two individuals who were not tied to any particular organization at the time of interviewing, the others who suggested this diverging inclination said they chose learning endeavors simply according to what questions interested them most. As a 52 year old sales manager said, ‘learning is not about what will help me at work, but is it interesting and relevant to my life now – is it about the bigger me’.

You can always learn something. . . . If you’re not prepared to learn and find and dig and spend hours of doing things and researching and stuff then it’s just not going to work. . . . I’ve gone and re-taken tax courses just so that I could see what’s changed. I don’t want to miss anything. . . . Like I said if I’m learning if I’m looking for a specific topic and I learned about that there’s usually 10 other things so I literally make notes on things. Well this would be interesting this interesting, this is interesting and I’ll go back and look that stuff up. (man, chief financial officer for national health foundation, 50)

Overall, an ‘outreaching’ orientation does not appear to be particularly linked with employment status or success, role, access to resources and networks, or even proximity to retirement. In fact, the motivating theme voiced by many interviewees who we associated with outreaching was similar for those we described as consolidating: a commitment and the confidence as an older professional to follow one’s own interests in knowledge development. The difference was in directing these interests to expanding and stretching rather than contracting and deepening.

Re-Positioning

A third learning orientation, reflected among about 30% of interviewees, suggested a decision to re-direct or re-position one's knowledge development in a new focus. Sometimes new focus was related to a new job, or a reframing of the current job – not just another career transition, but a major re-directing of one's energies and professional identity. One 54-year-old man who had left his position as director of finance due to company restructuring, for example, said that he was now deliberately re-positioning himself by learning cost accounting for specific implementations. Another had, at 59, decided to become the ERP (enterprise resource planning) expert at his chemical firm: he explained that he had watched this area grow in importance, and finally had decided to learn all he could about it as his final contribution to the company. He also was clearly re-positioning himself as a knower within the firm, as someone with valuable and recognisable knowledge to offer. Those older accountants who had left large organisations to pursue self-employment, a small minority of the interviewees, also indicated a complete re-positioning of their knowledge. One 52-year old man left his controller's position in manufacturing after 17 years to open a small business in what he described as a 180° career turn: he was seeking new challenges, and now focused his development on 'learning to communicate with a wide variety of people, plus business strategy and process management'.

In direct contrast to literature expressing concern about older workers' capacity or willingness to learn in and for such major adjustments, these interviewees expressed enthusiasm for the knowledge development processes required in re-positioning. One woman, 62, who left a job as systems analyst in manufacturing after 15 years to become controller for an insurance firm, a 'big change in scope of responsibility and nature of activity, explains this willingness:

[T]he learning is easier now than in previous job shifts. Before it was a struggle to find out how to do it, who I had to talk to, who I had to get authorization from. Now it's a lot easier – because, my age, you know, the confidence in what I'm doing and the maturity from my age.

The increased ease and desire for learning as an older professional is attributed not only to personal confidence and 'contentment' with one's own decisions and positions as a knower, but also to the increased learning opportunities that some felt they enjoyed in later career stages.

I've reached a level that I'm comfortable at. I'm content. And that changes your perspective on a lot of things. But my intensity and my desire and need to learn has increased over the past five years compared to 10–15 year ago. It's because the job that I have, there is more to it, responsibility and scope. If there is something I need to learn I want to learn it. It's a question of an opportunity to learn.
(man, senior bank manager, 59)

About one-third of this group talked explicitly about re-positioning themselves to mentor the knowledge development of younger professionals: '*ending my career*

doing something really, really good. Really positive and to help someone, you know, really help them to be successful'. One described a general re-positioning away from self-interest to promoting others:

You're progressing in your career and moving upwards and want to have the sharpest best skills to move ahead, show you're better than others, and continue to be promoted. Then you reach a certain stage of a career where it becomes less self-focused and a progression to mentoring others. This starts to drive areas you're more interested in, which tend to be more around leadership and management capability - that's what I can help others in my organisation with rather than the technical skills. (man, corporate secretary multi national oil and gas, 57)

Whether re-directing their knowledge development focus to their own new job and new area of expertise, or to developing other, younger professionals' knowledge, these older professionals appear to do so deliberately, strategically and enthusiastically. More than a simple transition, this orientation seems to reflect changes that shift one's professional learning in fundamentally new directions. As one woman explained, 'Repositioning is about repositioning your own knowledge identity'.

Disengaging

A much smaller percentage of the interviewees – 14% - reflected an orientation to knowledge development that was more about distancing than re-engaging in learning. We termed this 'disengaging', but it does not signify resistance or disengagement from good professional practice. More accurately, these older professionals described themselves variously as 'slowing down', 'phasing myself out', or as 'giving the new guys the training'. This position was most often expressed in relation to impending retirement:

Of course I'm gearing up, I don't have that many years, so you know you get this kind of ender's disease where you're going to go pretty quick, so - how much do you want to invest in a project? I don't really want to learn this new model and these new skills. (woman, academic in a business faculty, 61)

Besides a personal decline in developing new professional knowledge, there was also a sense of wasted organizational resources.

Would you send me and spend 5–\$7,000, when I only got two to 3 years to be here when the guy two doors over is more likely going to be the chief accountant and maybe you'd be bringing him up to speed.... What I'm more interested in learning is, do I have enough to retire on and what do I need to do to retire?
(man, chief accountant for a pulp mill, 59)

Clearly, too, at least some older professionals were focusing more on knowledge related to their lives post-employment. Some indicated a sense of having learned as much as they could with no real desire to develop any further knowledge, at least, not in terms of their professional work. One man, 63, a controller at an engineering firm, described his learning as having 'slowed down, I've already covered most of what's on offer'. Another man, 61, controller at a large construction firm said that although he had no interest in retiring, that there also was 'not much more I can learn to do the

job better - life has stabilised'. One man explained that '15 years ago I was more accepting and gung-ho [about learning] ... I don't see anything I need to develop at this stage'. These statements suggest a work learning trajectory, perhaps more active in some past period, but now dwelling in some contentment with one's practice and position as a knower.

While interviewees who expressed a 'disengaging' orientation to accounting knowledge development were mostly in their late 50s or early-mid 60s, it must be recalled that other professionals in this age group also expressed orientations of increased engagement, either in consolidating, outreaching, or re-positioning their knowledge. Nonetheless, it seems natural that at least some individuals were conscious of fundamentally shifting learning interests as they positioned themselves for transitions out of professional employment.

Conclusions

Amidst the increasing concerns raised in policy and scholarly literature about retention and development of older workers, particularly through a perceived need for increasing their participation in continuous learning, this study set out to understand the relevance of such concerns and needs with respect to older professional workers in particular. The study asked, What knowledge do these workers value most, and what is their orientation and approach to professional learning in the face of increased demands for continuous learning? In what ways, and to what extent, do older professionals participate in learning? The overwhelming findings were, first, that these older accountants engaged intensively and eclectically in developing knowledge through wide-ranging resources and strategies, in some cases more intensively than they recalled doing so in their earlier career periods. Second, these older professionals were particularly focused and strategic in *how* they engaged with knowledge. Few were seeking provision of learning opportunities. Most also resisted being viewed and assessed as 'learners', particularly evident in the almost unanimous resentment of the 'school kid' requirement to submit annual records of their 'professional learning activities'. These themes align very much with Boud and Solomon's (2003) finding that naming 'learning' at work may not be particularly welcome among competent workers, and support Nerland's (2010) and Nerland and Jensen's (2010) argument that knowledge dynamics should be foregrounded in discussing professional learning.

The first two themes lead to the third, that most older accountants expected to decide for themselves what knowledge to develop and how. They expressed their sense of position and capacity as knowers, understanding their own priorities according to the demands of particular professional situations and roles, and deliberately selecting knowledge strategies accordingly. Again and again they referred to finding freedom, as older professionals, from learning driven by others' decisions of what knowledge was most valuable – whether in relation to managers' goals, accreditation requirements, professional development courses, or just the general onslaught of change and new information. However it is useful to note that the kinds of knowledge they spoke about was, with very few exceptions, all related to improvement of professional practices. That is, almost all examples of learning offered by these older

professionals focused on job performance rather than on critical questioning of factors compelling particular job performances or privileging particular knowledges. Clearly their narratives revealed many of the dynamics dominating literature about changing professionalisms and conditions of practice within ‘new capitalism’ (Sennett 2006): the shift to organisational accountabilities with increased audit and managerialism (Evetts 2009), the co-production and interprofessional work arrangements (Lee and Dunston 2009), the importance of competitive networking, job contingency, and the intensified workload and pace of change.

However most interviewees seemed comfortably accustomed to manoeuvring in and around these structures to balance what Stronach et al. (2002) called the conflicting discourses of ‘ecologies of practice’ with ‘economies of performance’. That is, in each new situation whether a job change or new regulatory protocol, most figured out the activities and level of challenge that suited them most, then arranged ways to learn what they needed to engage these effectively. While some mentioned the relentless pace of change and the deluge of information, and incidentally the need for self-protective strategies of focusing and selecting what they engaged with, none registered critical concern about this change other than a few mentions of being ‘tired’. In fact, many of their own knowledge development strategies were for adapting to continuous organizational restructuring, new jobs and new procedures. Yet they didn’t simply continue to drift through different knowledges according to demands of market and organisation: they adopted orientations like ‘consolidating’ and ‘repositioning’ through which they created a stance, an anchor for themselves, almost a self-protective way of retaining recognisable value without being forced to continually ‘shapeshift’ to adapt to new work orders (Gee et al. 1996). There seemed to be among these older professional workers little critical awareness of the larger systems and forces in which they are caught, and in fact they appeared to accept the demand for their personal resilience. While almost all resented the drive for learning exerted by their professional association – one spoke disparagingly about the expectation of continuous learning as a ‘treadmill’ and ‘rat race’- this resentment never appeared to be directed at the pace or structure of their work organisations themselves. This dynamic may spark concern among those critical educators who believe that workers need to develop a critical consciousness and tools of resistance for these forces that some call new capitalism. Or, it may provoke us to look more closely at the spaces that workers find or make to do what they need to do to remain successfully employed, but to do it in their own ways while avoiding subjugation.

In fact, these older professionals appeared to determine for themselves, and to defend, particular positions as knowers. This discussion highlighted four orientations to knowledge development that emerged in their descriptions of themselves as knowers and their knowledge-seeking endeavours. As stated at the outset, these four orientations of consolidating, outreaching, re-positioning, and disengaging are intended to suggest some of the broad, overlapping tendencies appearing in individuals’ stories about themselves. At best they indicate moments in learning practices, certainly not stages or characteristics pertaining to individuals. More accurately, they can suggest differences in how older professionals position and direct their learning at particular times, while demonstrating a strong general commitment to and interest in learning. Almost none reflect the sorts of disconnection from continuous professional learning envisioned in general policy concerns about older workers’ participation.

This finding alone raises interesting questions about how little we may understand older professionals' approaches to and participation in learning.

Most prescriptions for older workers and learning begin and end with recommendations for more learning opportunities to be provided. Yet this study suggests that at least for these particular older professional accountants, a rather different approach may be more effective. First, employers and the professional association perhaps should be concerned less with provision of learning/training and more with explicit recognition and valuing of mature professionals' knowledge, their views of professional knowledge, and their approaches to learning. This recognition might include the extent of their capacity and responsibility to determine for themselves those forms of knowledge and skill most important to develop in light of their current role, organization, project etc., and what particular resources are most useful to engage. Second, processes for assessment of professional learning may need to be adjusted for older or well experienced practitioners. These processes might, for example, invite such professionals to explain their current areas of interest, the resources/activities that they find most useful, or the ways they are fostering knowledge development in their organizations, rather than focusing on listing quantities of personal learning activities. Third, this study highlights the possibility that older professionals individually adopt very different orientations to knowledge development according to what may be an interrelated host of reasons: work focus, professional identity, organizational environment, personal sense of career trajectory, health and energy, and so forth. These different orientations challenge a universal virtue of 'continuous learning' for professionals as though they ought to simply continue to accumulate new knowledge and skills throughout their career, and suggest a more nuanced appreciation of professionals' development. In practice, employers and professional associations might take time to understand older professionals' unique orientation to knowledge development, and their reasons for this orientation. Some may desire new challenges, others to deepen what they already know, some more explicit opportunities to share knowledge with colleagues, and others to focus on learning for a new, post-employment sphere of living.

Finally, given the disparity between this study's findings and studies focused on other occupational groups of older workers (Pillay et al. 2003; Porcellato et al. 2010), there clearly is need for greater precision in conceptualizing the category of 'older worker'. Perhaps important distinctions accrue to professionally trained knowledge workers, or to practitioners in the financial sector, or to professionals experiencing high rates of change in regulations or job change. It is also possible that older professionals' engagements in learning vary regionally, culturally and historically: the findings of this study of accountants trained in the 1970s and 80s practicing in oil-rich western Canada just prior to the global financial crisis of 2008–9 may be very different from studies based in parts of Europe at the present historic moment. While this study cannot identify which specific dimensions of this group are most responsible for the difference, it can point to the need for more differentiated research. Further comparative research on different locations, disciplines and work arrangements of older workers and older professional workers, in context of changing regulations, expectations and conditions of practice, will help develop this body of research.

On its own terms, this study has established that older professionals do appear to have unique approaches to developing knowledge for their work, at least in their perceptions of their own learning differences relative to younger professionals. They

position themselves in diverse ways as knowers and are strategic and focused in accessing learning strategies related to these particular knowledge orientations. Policy development to ensure continuous professional learning, or to retain and support older workers, might consider a dual foci: first, promoting employers' and professional associations' recognition and valuing of older professionals' distinctive and contextually effective learning strategies; and second, promoting wider understanding and respect for older professionals' adoption of particular knowledge orientations. While these may not on the surface appear to be consistent with fashionable notions of continuous innovation, they may offer a more realistic insight into how people actually engage knowledge and position themselves as knowers in mature career stages.

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