

# Professional Development of Older Employees in Small and Medium Enterprises

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## Abstract

**Purpose:** The aim of the paper is to present and assess professional development opportunities for older employees in SME.

**Methodology:** In the process of desk research, the author has discerned a number of characteristics of training activities conducted by SMEs. The management of older employees' professional development is discussed on the basis of selected research findings, *i.a.* CATI and CAPI surveys conducted in the framework of the “Comprehensive program of activation of people aged 50+” project carried out by the Department of Human Resource Management at Kozminski University in 2010–2012.

**Findings:** The first part of the paper discusses the specificity of training measures undertaken in SMEs. According to a large body research results available, these include: informality, reactivity, short-term perspective, focus on solving current problems, “learning by doing”, focus on the development of specific skills and organizational knowledge, lack of professional organization of trainings. The core part of the paper focuses on the management of professional development of older employees in SMEs. The majority of surveyed firms have declared providing their older and younger employees with the same access to training. However, it does not always mean training is organised, or that employees aged 50+ participate in it. Moreover, the survey has proven the existence of significant differences in assessments and opinions among entrepreneurs and employees.

**Originality/value:** This paper discusses professional development of older SME employees, which is a relatively new problem; it is based on an extensive body of research. Managing professional development of older workers is one of the most important challenges faced by SMEs in the twenty-first century and it shall require extensive and thorough research in the future.

**Keywords:** training, professional development, older workers, small and medium-sized enterprises

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## Introduction

Small and medium-sized enterprises (SMEs) play an important economic role, contribute significantly to the generation of national income, as well as to employment, development and innovation. Until the 1980s, SMEs were to a great extent disregarded by management theorists. Our current understanding of the specific nature of SMEs, despite the growing body of research and publications, remains fragmentary. Knowledge gaps are particularly visible in relation to staff management, which is carried out in SMEs in a different manner than in large enterprises.

The aim of this paper is to present and evaluate professional development opportunities provided to older workers by small and medium-sized companies. This issue has come to the fore in the framework of research conducted in Polish SMEs in recent years. Although professional development of employees is one of the most important areas of human resource management and is of strategic importance for both the organization and for employees, it is often underestimated in smaller organizations. In turbulent environments, knowledge, skills and attitudes of employees are particularly relevant, as well as their loyalty, commitment and ability to recognize and respond appropriately to changes, to emerging opportunities and threats. The need to continuously acquire and update knowledge and skills requires an appropriate management of the process of employee and organization development. In our aging societies, it is becoming necessary to retain older workers in organizations and extend the period of their professional activity. This applies also to small and medium-sized enterprises (Kołodziejczyk-Olczak, 2013, p. 113).

Considerations regarding development opportunities for older workers were based on selected findings of research carried out in three regions of Poland: Pomerania, Podlasie and Mazovia (Perek-Bialas et al., 2011; Sadowski-Snarska, 2011; Szmidt, 2012).

## Employee professional development – terminology

Theorists and practitioners dealing with professional development of employees refer to numerous and inconsistently defined concepts. The same concept applied by different authors can be understood in dissimilar manner; also, that the same or similar phenomena are referred to with a variety of terms, which results in a conceptual chaos (Sitko-Lutek, 2004, p. 78). Training, improvement and development are the most commonly used terms. A gradual extension of the concept of training has become evident in recent publications. Initially, management and human resource management theorists

defined training rather narrowly, as the process in which technical staff learn to perform their duties; it was set apart from the concept of professional improvement, applied in relation to professionals and managers (Griffin, 1996, p. 436). In subsequent years, the spectrum of measures defined as training gradually expanded and differences between these two concepts began to blur.

The majority of Polish authors seem to regard the concept of training as narrower than development. The majority have adopted the definition of training formulated by A. Poczowski: “all purposeful and systematic measures taken within an organization and aimed at deepening and broadening certain aspects of human resources, as well as equipping them with new elements, essential for meeting the present and future needs of the organization” (2003, p. 299). Poczowski and many other authors (including T. Listwaman, H. Król, M. Kostera, M. Rybak, A. Miś) regard training as a basic tool of human resource development. Certain theorists refer to improvement. Some authors, for instance T. Listwan, identify it with the concept of training (1995, p. 82) while others, like A. Sitko-Lutek, define them in a much wider manner (2004, p. 83–84) and closer to the concept of development.

Many authors of English monographs – some of them experienced practitioners – emphasize that the concepts of training and development are not synonymous, yet they suggest associating them. A. Mayo perceives training as a measure aimed at improving professional skills, whereas development is more forward-looking and long-term. He tends to refer to “human resource development”, understood as all activities related to training, learning and development (2002, p. 10). Other scholars, like M. Sloman and D. Kirkpatrick, choose a deliberate simplification and equate these terms (“Despite certain differences between the two terms, I have decided to refer to them simply as training for reasons of simplicity” (Kirkpatrick, 2001, p. 16)), or use them interchangeably.

Publications on small and medium-sized enterprises tend to define training in a broad manner; some perceive as training any form of learning, even accidental, that takes place in the process of performing work (Rossiter, 2000, p. 88). The majority of authors suggest the use of the terms of training and development together. R. Hill and J. Stewart, prominent researchers and authors of major studies, have decided to use the terms “human resources” and “training and development” interchangeably in order to simplify the discussion, however without treating them as synonyms. Aware that individual measures of “training” and “development” convey different meanings in theory and practice, they decided to use them together. It is consistent with the “Investors in People” standard, which represents a broad understanding of the concepts of training

and development as measures developing skills and/or knowledge and/or influencing behaviour (2000, p. 108).

This approach is widespread among researchers of SMEs, which persuaded the author to adopt it in her study. In this paper, training shall be construed as any activities that promote and support learning and improve the efficiency of workers, and the concept of training and development shall be used interchangeably.

## Management of professional development of SME employees

Professional development of employees in small and medium-sized companies tends to be informal. Learning takes place in the process of working, through the performance of daily duties. The majority of researchers emphasize that SMEs organize formal training much less frequently than large enterprises (Bacon and Hoque, 2005, p. 1976; Bryan, 2006, p. 635; Coetzer and Perry, 2008, p. 649; Hill, 2002, p. 125; Saru, 2007, p. 42). Authors often argue that many small organizations provide their employees with no training at all; in numerous enterprises training sessions are few and far between (Hill, 2004, p. 9; Saru, 2007, p. 42). Therefore, in publications relating to SMEs, the concept of “training” is usually used together with “development”, which allows a broad view of development activities in the framework of informal activities, such as briefings delivered by managers, shadowing and mentoring, as well as formal measures, for instance in-house training delivered by one of the employees or by an external trainer (Hill and Stewart, 2000, p. 108).

Formalized training sessions become more frequent as the organization grows (Storey, 2002, p. 251; Taylor, Shaw and Thorpe, 2004, p. 27), which is associated with a progressive formalization of other human resource management practices. Authors have also observed that growing organizations tend to have recourse to external training, aimed not only at improving the qualifications and skills that are necessary for their employees at a given time, but also preparing them to take up senior positions in the future (Kotey and Folker, 2007, p. 217).

Measures aimed at employee development in SMEs have a specific character. On the basis of research conducted in SME, the following characteristics can be pointed out:

- informality,
- reactivity,
- short-term perspective,

- learning through work, resulting in the predominance of “on the job” training,
- focus on the development of specific skills and organizational knowledge,
- lack of professional organization of training schemes.

It is worth noting that SMEs often declare that employee training is one of their priorities (Bacon and Hoque, 2005, p. 1977; Mayson and Barrett, 2006, p. 449). However, researchers argue that in the majority of cases, these declarations do not translate into actions undertaken in this area. In the study conducted by C. Cassell et al., all companies perceive training as an important investment, yet only half of them employed a person who was formally in charge of personnel matters; processes of broadly understood employee development were observed in only 9 out of 22 companies that participated in the in-depth study (Cassell, Nadin, Gray and Clegg, 2002, p. 682–683).

One of the authors referred to this situation as the “training paradox”. Although the approach of entrepreneurs to training is generally positive, not all of them provide their employees with the opportunity to participate in training or strive to meet their professional development needs (Matlay, 2002, p. 359). It can be argued that the majority of entrepreneurs do not regard human resource management as an area of key importance for business and perceives expenses incurred for this purpose rather as costs than investments (Mayson and Barrett, 2006, p. 452). This also applies to staff development (Matlay, 2002, p. 364).

Researchers have recently turned their attention to the issue of professionalization of human resource management in SMEs, stressing that the key role in this process is played by knowledge, skills and awareness of owners and managers (Pocztowski and Pauli, 2013, p. 12–13). The level of professionalization of the surveyed firms in the area of training is low, and it relates in particular to the phase of identifying training needs and evaluating the effectiveness of training. Less than 40 per cent of surveyed enterprises conduct an analysis of training needs involving at least two people, while nearly one-third do not assess training needs at all; it is a most dissatisfying score, especially given that 15 per cent of the surveyed firms failed to provide a response. Only 30 per cent of enterprises carry out an assessment of the effectiveness of training, which consists of verifying the acquired knowledge and skills, their application at work and an evaluation of changes in employee efficiency. More than half of the surveyed companies did not reply to the question regarding training effectiveness evaluation reports, which implies the absence of such documents in enterprise archives. Interestingly, 80 per cent of surveyed companies claimed to provide their employees with various development techniques, but only 31 per cent organize regular training (Pocztowski and Pauli, 2013, p. 17–19).

This means that the vast majority of enterprises still provide only occasional training for their employees, without a specific scheme and in an unsystematic manner. Hence, further education of managers and owners of small and medium-sized enterprises seems necessary, as well as the dissemination of research results. Researchers have observed that the formalization of activities in the area of staff training substantially reduces the risk of failure: enterprises that have recourse to formalized training programmes tend to be less prone to failure (Storey, 2004, p. 120). The results of research conducted by D. Jayawarna, A. Macpherson and A. Wilson are also of import. They precisely defined methods of formal and informal training (2007, p. 335) and examined the relationship between various training methods applied, the number of firms and their increase in turnover. They proved that small and medium-sized enterprises that train their employees tend to perform better than those that fail to do it, and that investing in formal training translates into higher sales growth than informal trainings. It is worth noting that among formal training methods, in-house training provided by external trainers to employees within the organization and internal courses run by employees themselves seem to have the greatest positive impact on the results of firms. Among informal methods, only seminars and training events have a significant impact on the results achieved by enterprises.

These findings should be disseminated among managers of SMEs in order to encourage them to change the approach and invest in employee development.

## Managing the development of older employees

In our aging society, one of many challenges faced by organizations is the need to ensure an adequate number of workers with the necessary competencies and skills (Wisniewski, 2009, p. 9). Given the inexorable demographic processes, enterprises that fail to take necessary action risk facing serious problems in the future (Armstrong-Stassen and Templer, 2005, p. 58). Not only corporations, but also smaller firms will have to take measures aimed at older workers, in order to provide them with appropriate qualifications and skills necessary to perform their tasks. This means that it will be necessary not only to draw more attention to issues of professional development of employees, but also to managing the development of older workers.

In relation to training of older workers, authors emphasize three crucial issues: access to training, training methods adapted to needs, preferences and learning style of workers from this age group and raising the awareness of managers (Armstrong-Stassen and Templer, 2005, p. 58). Analysis of statistical data and conducted studies

allow us to conclude that, pursuant to the human capital theory, older workers are less likely to participate in training (Fouarge and Schils 2008, p. 13, 37; Tikkanen et al. 2002, s.v). An important reason for not participating in training is the lack of interest in raising qualifications, often declared by older workers. This explanation was given by 52 per cent of firm surveyed in Canada; 46 per cent claimed that training was not their priority (Armstrong-Stassen and Templer, 2005, p. 63–64). Lack of confidence in one's abilities or a stereotypical perception that older workers tend to have of themselves have discouraged them from participation in training (Tikkanen et al. 2002, p. 21). Few companies endeavour to adapt their training methods to the needs and expectations of older workers, and even fewer invest in education and raising awareness of managers (Armstrong-Stassen and Templer, 2005, p. 63).

It seems that the attitude of managers to the issue of training for those aged 50+ is particularly important for SMEs, as the position of the owners and managers is crucial, or even dominant in organisations of this type (Tikkanen et al., 2002, p. 16). Failure to adapt training or courses to the capabilities and learning preferences of employees may bring results that are very different from the expected effects (Van der Heijden, 2002, p. 333).

## **Development of older workers in SMEs – selected research results**

Participation of older workers in training has been subject to research conducted in three Polish regions, namely in Pomerania, Podlasie and Mazovia (Perek-Bialas et al., 2011; Sadowski-Snarska, 2011; Szmidt, 2012). As it was not the focal point of the research, data used in the analysis outlined further is fragmentary. In Podlasie and Mazovia, research was conducted in SMEs only, whereas in Pomerania it encompassed also large enterprises.

According to the final report of the study conducted in Pomerania, two thirds of the surveyed companies claimed to have organised training in the past year; a vast majority (85 per cent) stated that employees aged 50+ participated in training sessions. Among them, medium-sized and large firms (84 per cent of companies employing more than 50 staff) were more numerous than small enterprises (only 62 per cent of entities). The majority of organisations that did not provide training to older workers claimed that it was not necessary. The lack of necessary resources was referred to much less frequently, just as the fact that training was addressed to other groups of employees; very few firms claimed that older workers did not wish to participate in training.

Interestingly, the majority of the surveyed enterprises declared that their 50+ employees participate in training rather willingly. This opinion was represented by nearly two thirds of the respondents, while 20 per cent claimed the opposite (Perek-Bialas et al., 2011, p. 101).

These statements, evidencing the perceived willingness of older workers to participate in training, should be compared to answers provided to the question about the useful type of training for this age group. Few employers are convinced that this group of employees does not need training at all (5 per cent of surveyed organizations), while 8 per cent is unable to specify the type of training that could prove beneficial. Although the percentage of firms representing this attitude is relatively small, it is difficult to ignore their existence. It is interesting to compare the views of employers and employees on training that would be useful to 50+ workers. Employers tend to indicate training in IT skills as crucial for this group of employees (27 per cent of responses), followed by personal and career development (14 per cent of responses) and accounting (10 per cent of responses). According to employees, the most important types of training are language (26 per cent of responses) and IT courses (18 per cent). Other types of training were referred to by fewer than 10 per cent of respondents; training related to personal and career development – important according to employers – was mentioned only by 6 per cent of the surveyed employees. Employers tend to perceive foreign language training as much less important (9 per cent compared to 26 per cent of employees); conversely, they consider specialized training as considerably more valuable (in relation to most types of specialized training, approx. 9 per cent of employers as compared to approx. 2–4 per cent of surveyed employees). In terms of development opportunities, the needs and expectations of employees differ significantly from what is declared by employers (Perek-Bialas et al., 2011, p. 100–101).

Less than half of enterprises (40 per cent) claim to draw up training plans. Just as in the case of questions about the organization of training, it was declared more often by medium-sized and large enterprises. Almost all firms stated that their training plans encompass employees of all ages (Perek-Bialas et al., 2011, p. 101–102).

In small and medium-sized companies from Podlasie, surveyed in the POKL's project "Innovation 50+", training activity was slightly lower. Although more than 60 per cent of the surveyed companies are aware of a relationship between the professional development of older workers and the development of the organization itself, their training activity remains relatively limited. As many as 27 per cent of the surveyed companies (more from the private sector – approx. 30 per cent than from the public sector – approx. 17 per cent) declared that they did not conduct any staff training. Employers complain



about high costs of training (nearly 20 per cent of the surveyed firms) and the lack of training that would suit their needs (over 18 per cent). Only half of the surveyed enterprises organize training courses attended by older workers. The situation of older employees in the public sector seems relatively better than in private firms: public sector staff aged 50+ is almost twice as likely to benefit from training. Training for this group of workers was conducted in over 70 per cent of enterprises in the public sector and in less than 39 per cent of private sector companies (Sadowska-Snarska, 2011, p. 65–66).

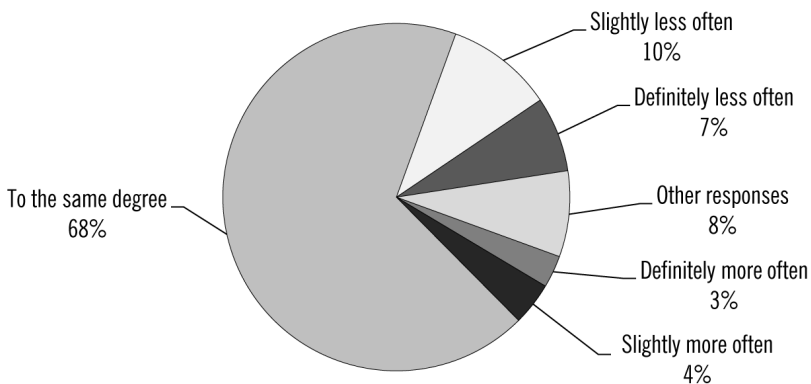
Employers' perception of the value of investment in training for employees aged 50+ deserves an analysis. Few evaluate them as not profitable at all (5.6 per cent of responses), or claim that training represents a waste of time, which would otherwise be spent working (5.2 per cent), and that it would be very difficult to replace those in training by their colleagues (6.9 per cent). A larger group of employers believe that they are responsible for the development of knowledge and skills of staff (10.5 per cent of responses). More than twice as many have a negative attitude towards the development of employees aged 50+. In the opinion of almost a quarter of employers, older staff do not need training, and nearly 30 per cent believe that this group of workers are not willing to learn. Thus, it can be concluded that a large number of small and medium-sized businesses fail to recognize the value of professional development of older workers. To some extent, it may be due to the lack of training tailored to the needs of SMEs available on the market (as mentioned above, this is the opinion of 18 per cent of respondents) and to the fact that training costs are considered to be excessively high (almost 20 per cent of respondents), which is closely related to their lack of information about the availability of subsidized training programmes for older workers (almost 30 per cent of firms). Given these circumstances, one can hardly expect employers to take any action in this area, as 29 per cent of them believe that older workers are not interested in their professional development and learning (Sadowska-Snarska, 2011, p. 66).

Activation of those aged 50+ was the subject of research conducted in the framework of the project "Comprehensive program of activation of people aged 50+" carried out by the Department of Human Resource Management at Kozminski University in 2010–2012. In the survey conducted among entrepreneurs and employees aged 50+ in Mazovian SMEs, the issues of professional development of older workers were also addressed.

Employers (CATI survey, 894 enterprises employing older workers) were asked to assess the interest of employees aged 50+ in training and specify the frequency of training provided to their staff. According to 42 per cent of employers, older staff are

less willing to participate in training than their younger colleagues: they were “much less interested in professional development” according to 15 per cent and “slightly less interested” according to 27 per cent. A marginally smaller group of employers (40 per cent of respondents) believe that older workers are just as interested in training as their younger colleagues, while 16 per cent believe that that they are more willing to improve their knowledge and skills through training (with the same number of entrepreneurs claiming they want to participate in training much more and slightly more often). Detailed data is presented in Figure 1.

**Figure 1.** Willingness of workers aged 50+ to participate in training



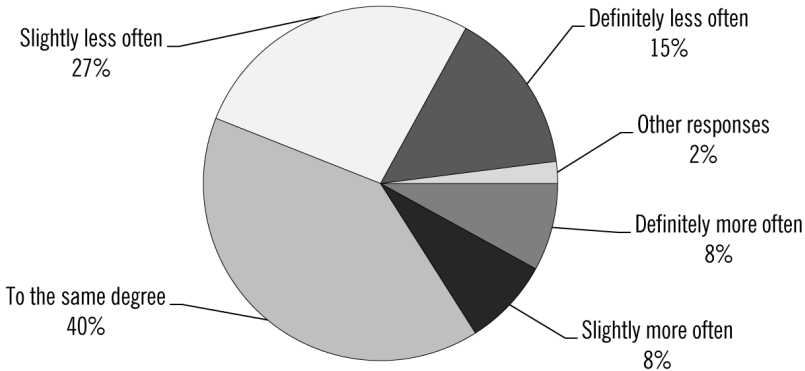
Source: own study.

Interestingly, many young employers (aged 30 or younger) perceive older workers as less interested in professional improvement. This opinion was formulated by 54 per cent of young respondents, as compared to 42 per cent of all surveyed employers. Similarly, older employers often perceive older workers as willing to develop their skills (25 per cent of respondents aged between 51 to 60, as compared to 16 per cent of all surveyed employers).

Employers were also asked how often their employees aged 50+ participate in training. Although the vast majority of them (82 per cent of respondents) believe that older workers are less or just as willing as young people to develop their skills, enterprises strive to provide all employees with similar opportunities. Only 17 per cent of enterprises provided their 50+ employees with fewer training opportunities than their younger colleagues (including 7 per cent of firms where these opportunities were “definitely fewer” and 10 per cent where they were “slightly fewer”). The majority (68 per cent) of surveyed employers declared that 50+ employees benefit from training as often as younger staff, and 7 per cent of employers stated that older workers are

provided with more training (“much more training” in the case of 3 per cent and “slightly more” in the case of 4 per cent). Relevant data is presented in Figure 2.

**Figure 2.** Participation of workers aged 50+ to participate in training



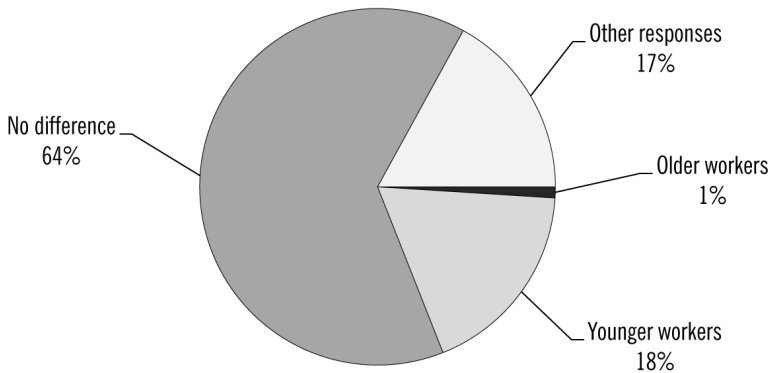
Source: own study.

The project encompassed a survey conducted among workers aged 50+ (CAPI survey, sample of 751 respondents), who were asked, among others, which group of employees in their organizations participate in training more often: younger or older workers. The majority of respondents (64 per cent) claimed not to be aware of any differences in this respect. 18 per cent stated that younger staff benefit more frequently from training. It can therefore be concluded that these responses are consistent with the views of employers outlined above. Conversely, only 7 per cent of employers claimed that older workers had access to greater training opportunities, as compared to only 1 per cent of employees representing this view. Some employees refrained from formulating a clear statement and chose the “I do not know” or “Not applicable” option. Responses provided are outlined in Figure 3.

Improvement of skills and competences is closely related to promotion opportunities. Employers were asked whether any employee from the 50+ group was promoted in their enterprise in the period of the last three years; employees were to specify which group of employees were more often promoted in their organisation. Older workers were promoted in 26 per cent of companies participating in the survey – it was understandably more frequent in larger firms (in 16 per cent of firms employing 10–24 staff, as compared to 47 per cent of firms employing 100–249 people). Older workers’ assessment of promotion opportunities is quite similar to their assessment of training opportunities. Only 3 per cent of respondents felt that their companies often promoted older employees, while 22 per cent claimed that younger employees were privileged in this

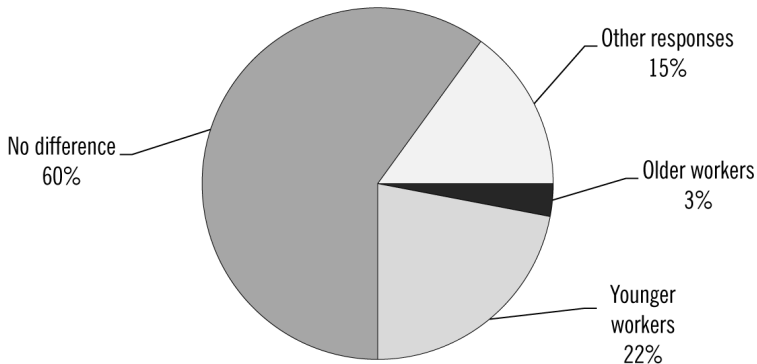
respect. The largest group of respondents (60 per cent) have not noticed any differences between younger and older workers. A large group of respondents chose not to express their opinion (15 per cent ticked the “I do not know” and “Not applicable” options). Detailed results are presented in Figure 4.

**Figure 3.** Who participates in training more often?



Source: own study.

**Figure 4.** Who is more often promoted?



Source: own study.

Similar answers were also obtained in response to a question about tasks and responsibilities assigned to employees – according to 20 per cent of respondents, younger workers are entrusted with more ambitious tasks; the opposite view was expressed by 7 per cent of respondents. It can therefore be concluded that respondents were significantly more likely to consider their group to be at a disadvantage, with younger

workers more frequently promoted, provided with training and entrusted with more interesting and challenging tasks.

50+ employees were also asked how often, over the last 3 years, they participated in non-compulsory training. Among respondents aged 50+, only 16 per cent admitted to having done so; less than a third expects to be provided with such opportunities in the future. If we compare these results with the statements of employers who claim that employees aged 50+ have access to the same (68 per cent) or even greater (7 per cent of respondents) training opportunities, and with similar opinions expressed by employees (with 64 per cent claiming to have the same access to training and 1 per cent of respondents indicating that older workers have greater training opportunities), it becomes evident that these statements do not reflect the actual situation. This is consistent with the results of numerous studies, according to which smaller firms are considerably less likely to organise training for their staff than large enterprises (Trochimiuk, 2013, p. 134).

Both employers and employees were asked whether older workers were treated differently than their younger colleagues. The majority claimed not to be aware of any differences, while 3 per cent of employees (24 people) and 9 per cent of employers (40 persons) admitted that older workers were at a disadvantage. Interestingly, no employers participating in the survey were under the impression that older workers were left out, for instance with respect to training sessions or other events, even though this phenomenon was observed and reported by several employees. Conversely, twice as many employers as workers claimed that older employees had fewer opportunities for development and promotion, as well as worse jobs.

Psychophysical characteristics affecting the manner in which we learn and develop change with age. Employers and employees were asked to assess mental, social and physical capacities of workers aged 50+, namely memory, the ability to concentrate, mental strength, the ability to learn and physical fitness. In all of these areas, significant statistical disparities were observed between answers provided by different groups of respondents – as compared to the opinion formulated by employers, older workers assess their own capabilities as much higher. Detailed data is presented in Table 1.

Both employees and employers recognize the importance of skills and abilities, admitting that inadequate qualifications contribute to professional inactivity; this opinion was formulated by 18 per cent of employees and 21 per cent of employers. At the same time, however, neither group was able to specifically identify what kind of training would improve the situation of workers aged 50+ in a particular organisation and on

the labour market. The most frequently indicated included ICT training (6 per cent of employees and 11 per cent of employers; statistically significant difference between the two groups) and foreign language training (4 per cent of employees and 7 per cent of employers). In this respect, some employers – as opposed to employees – recognise the importance of courses and education (4 per cent of employers against 1 per cent of employees; statistically significant difference between the two groups). If we compare these survey results with answers provided by respondents in the project conducted in Pomerania, significant differences can be pointed out. Both employers and employees of organisations in Pomerania appeared more decisive and expressed stronger preferences. This could be interpreted as greater doubts as to the capability of training to improve the situation of older people in the labour market. It is confirmed by the results of qualitative research carried out within the “Comprehensive program of activation of people aged 50+” (IDI survey among employers and labour market experts; FGI survey among workers and the unemployed aged 50+), on the basis of which it can be concluded that much of the available training does not meet the needs of older workers and it scarcely takes into account their psychophysical and social capabilities (Skrzek-Lubasińska, 2012, p. 370).

**Table 1.** Assessment of selected mental and physical capacities of workers aged 50+

No.	Mental and physical capacities of workers aged 50+	Employers' assessment	Employees' assessment
1.	Memory	68%	76%
2.	Concentration	68%	75%
3.	Mental strength	66%	73%
4.	Ability to learn	63%	71%
5.	Physical fitness	58%	70%

Source: own study on the basis of Kozminski University and SMG/KRC research findings.

On the basis of selected survey results from the three analysed projects, it can be concluded that career opportunities of older workers are relatively limited. This is largely due to the restricted access to training in smaller firms as compared to large organisations, and to moderate financial capabilities of SMEs, although these are probably not the only reasons. An important factor is the employers' perception of their employees aged 50+, of their abilities and willingness to learn, their psychophysical capabilities, as well as the value of their knowledge and experience to the organization.

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