

Fathoming the Ageing Workforce Debate: Causal Layered Analysis in Action

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Abstract

This article describes how a futures methodology, Causal Layered Analysis (CLA), is put into practice in a workshop to develop a human resources response to the problem of ageing workforce. Used at the beginning of the policy development process, CLA successfully facilitated a broader and deeper collective understanding of the problem than would have been otherwise possible, given the homogeneity of the workshop group. Broader framing of a problem leads to a more holistic and balanced policy response.

Introduction

Ageing is an issue that has received much attention in Australia in recent times, mainly because of a demographic glitch commonly referred to as the Baby Boom. Whereas forty years ago this numerically large age cohort was full of future promise to their parents, now it is a potentially unaffordable burden to their children.

Is ageing the problem it is made out to be by governments and media alike? This article describes how a futures methodology, Causal Layered Analysis (CLA) is put into practice in a human resource management context to fathom the ageing workforce debate.

CLA was successfully used in a workshop for senior managers of the Brisbane City Council to broaden and deepen discussion about workforce ageing: broaden by examining the views of four different age cohorts, and deepen by progressing from superficial to emotional levels of understanding.

What is Causal Layered Analysis?

Causal Layered Analysis (Inayatullah 2002) is a futures methodology for exploring the breadth and depth of collective understanding about an issue or problem. Those who define a problem determine how the problem is framed. The way in which a problem is framed effects the policy solution.

Everyone, consciously or not, has their own personal belief system, which colours the way they view the world. Policy analysts often find themselves in danger of framing policy problems in terms of one particular world view - their own. Middle aged, middle class policy analysts tend to frame problems from the perspective of the middle aged and

the middle class. In a society that is increasingly multicultural and globally influenced, the risks to this approach would appear obvious.

In Australia the problem of population ageing has been framed in terms of the projected cost burden to the working population, ie skyrocketing government expenditure on health care and pensions (Commonwealth of Australia 2002). A major policy solution was to reduce the intergenerational financial burden by introducing superannuation reforms to extend the working life of citizens beyond traditional retirement age (Costello 2004).

CLA methodology attempts to overcome a narrow view of the world by allowing policy analysts to explore issues and problems from broader perspectives and deeper layers of understanding. Broader perspectives are obtained from different ethnic, age, gender, religious or social sub-groups of the target population. The deeper layers of CLA are:

- litany
- social causes
- world view and
- metaphor.

Litany is the most superficial layer, the level at which problems are most commonly understood, the headlines shouted by the media. However litany is just the tip of the iceberg.

Beneath the surface lie the social causes of the problem. Causes may be social, technological, economic, environmental, political or historical. Facts, statistics and quantitative analysis may be presented as “proof” of the problem, or as support for a proposed course of action. At this point the problem is regarded dispassionately. Whilst the accuracy of the data may be questioned, the basic underlying assumptions and beliefs of the policy analysts and their language of communication remain unchallenged.

It is at the third layer, world view, where underlying belief systems and deeper assumptions are revealed and unpacked. As participants work across world views that are different to their own they begin to see the problem differently. It is no longer a single entity with a unique solution, rather an amorphous mass of understanding within broader social contexts, with the potential for a multitude of alternate solutions that would have never been apparent before.

The fourth layer is the metaphor, the story behind each world view. This is the deepest, most emotive, and most creative of all the levels. Participants are asked to create an analogy or strong culturally-linked metaphor to describe how each world view is experienced, how it feels. This may be unfamiliar territory for many participants however it is critical in “unfreezing” the thinking of the group.

Outputs from CLA may be developed into future scenarios, from which a desired future is chosen, and actions can be identified to move from the present to the desired future.

The Context

In this case study CLA was used in a human resources planning workshop to open up the thinking of a group of senior managers about workforce ageing. The Brisbane City Council is a large local government authority with a workforce of approximately 7500, including professional, administrative, trade, and manual operational workers. Analysis of personnel records revealed that forty percent of the workforce was over the age of 46 years, including an even higher proportion of the so-called “blue collar” workforce, ie trade and operational workers. This was considered a problem because, for manual workers, the risk of work-related illness and injury increases with age, which implied potential increases in costs relating to sick leave, workers’ compensation and lost productivity. Other concerns included:

- loss of organisational knowledge as employees retire
- cost of replacing employees
- difficulty of sourcing appropriately skilled replacements in a competitive labour market
- decreased retention of younger workers because of perceived career blockages.

A selection of senior managers and human resources professionals was invited to a two-hour workshop to examine the problem, leading to the development of suitable interventions. They were a homogeneous group typical of the public sector. An approximate age scan of the participants showed that all fell into the so-called “Baby Boom” generation, the age cohort born in the post-World War Two years from 1946 to 1964. All were remunerated at the upper end of Brisbane City Council’s salary scales, and all worked as professionals, senior administrators and managers. Of the twelve, three were female. In running a planning workshop with such a group, there is a risk of middle aged, middle class solutions. For this reason CLA was selected in order to expand the range of options that could be considered.

How CLA was used

One week prior to the workshop pre-reading material about ageing workforce issues was distributed, including statistics, projections, and relevant literature which framed the issue in both positive and negative terms.

In order to improve the age diversity of the group, two younger employees of the human resources division were invited, one representing each of Generation X and Generation Y. Generation X, also referred to as the “baby bust” generation, was born between 1965 and the early 1980s. According to the literature they have a reputation for cynicism which is attributed firstly to being overshadowed by the sheer size and purchasing power of the preceding generation, and secondly to entering the labour market during the depths of the 1990s recession. Generation Y, the youngest generation in the workforce and the children of the “Baby Boomers”, has a reputation for questioning authority and dictating their own terms.

At the start of the workshop, participants were evenly divided between four tables. They were advised of the desired outputs, however they were not told about the CLA methodology that underpinned the workshop process.

The Process

In setting up workshop activities, the facilitator changed the order of CLA analysis slightly, commencing with the second layer, social causes. Analysis of litany, world view and metaphor layers followed in that order. Due to time constraints, development of scenarios and action planning were to be undertaken at a subsequent workshop.

Social Causes Layer

The first activity was designed to reach a common understanding of the social causes of the problem, including social, technological, economic and political aspects. Using “Post-it” notes, ie small coloured pieces of paper, and working individually, participants were asked to write one issue per Post-it. These were placed onto one wall of the meeting room, the “issues wall”, in related clusters. Examples of issues which appeared most frequently were:

- financial capability of governments to support an ageing population and increased taxation to support non-workers
- financial capacity of individuals to support their retirement
- loss of knowledge, skills and organisational wisdom
- safety of older workers
- suitability of the type of work available
- availability of flexible work options
- ability of older workers to adapt to change and new technology.

Litany Layer

Working in their table groups and referring to the “issues wall”, participants were asked to write a provocative newspaper headline and supporting points about the potential problem of an ageing workforce in BCC if no action was taken to address the issue. This activity was intended to reveal the “litany” layer of analysis. The following headlines and explanations were shared with the larger group:

- “**Sewage in the Streets – Council powerless.** The people who know how to fix it have retired and gone fishing.”
- “**Spain comes to Brisbane.** Elderly employees now work part-time and have afternoon siestas.”
- “**Brisbane City Council’s Budget Balloons.** Council has lost the employees they want, huge costs to keep workers they don’t want.”
- “**Stay healthy and active with Brisbane City Council.** Free arthritis tablets, seminars about living with Alzheimers, pensioner discounts for employees.”

World View Layer

For the next activity each of the tables was assigned a “generation”, Generation Y, Generation X, Baby Boom and Mature Generation. Participants were asked to “become” a person from their assigned generation. To facilitate exploration of their roles, participants referred to a stimulus sheet, and used their knowledge of others in that age cohort, such as parents, children or siblings. The young invitees were placed at the Generation X and Generation Y tables. The stimulus sheet covered current age, a description of the social context, defining events/music, and “where were you when...?”

An example of the stimuli given to the group designated as the “Mature Generation” is below.

Age now	Social context	Defining events/music	Where were you when ...?
58 plus	<ul style="list-style-type: none"> • Product of extended families • Heard consistent messages about values and good manners from all quarters. • Austerity, lean times as children • Hard work, sacrifice for the common good, respect for authority, and loyalty to the organisation. Values meaningful involvement. 	<ul style="list-style-type: none"> • “Bodgies & Widgies” • Brylcream • Elvis, Buddy Holly • Marlon Brando, Marilyn Munro • FJ Holden • Scholarship Exams 	<ul style="list-style-type: none"> • The atomic bomb was dropped? • Stalin died? • Suez Canal crisis? • “Sputnik” went into orbit?

Metaphor Layer

Once they were comfortable in their roles, participants were asked to discuss the following question in their generational groups. “How do the issues of an ageing workforce affect or impact on your generation now and into the future?”

After discussion at their tables, a representative of each generation told their story to the larger group. A brief summary of their stories follows:

Matures (Aged 58 and older)

“I’m out of here soon – I’ll leave when I’m ready. Until then just let me be, and don’t try to teach me anything new.”

Baby Boomers (Aged 40-57)

“Cool Runnings – We’ve always been able to change the world. Although we have some worries, we’ll work things out to suit ourselves”.

Generation X (Aged 22-39)

“Feeling threatened here – We will have to pay for the ageing population, but have no opportunity for promotion until the Boomers leave. How will we cope?”

Generation Y (Aged 21 and younger)

“Opportunity knocks – We are well educated, and have high expectations. We’ll dictate our own terms.”

The success of this exercise was in its capacity to significantly broaden discussion about workforce ageing, and to turn the problem from a predominantly negative focus into a more positive one. Participants realised that ageing meant different things to different generations. The problem was no longer restricted to managing the retirement of old and ailing workers. Instead it had the potential to tap into benefits and opportunities for each generation of worker. For example, if employees of the Mature Generation were not

interested in learning new techniques themselves, they might be interested in passing on their know-how to younger people.

Learnings

Firstly CLA is an effective methodology to use in a workshop situation to expand thought and discussion about a problem, in particular when a group is likely to have similar world views, or when a vocal majority is likely to eclipse contrasting minority perspectives.

Secondly whilst it is vital that the facilitators have a good working knowledge of the methodology, participants need to have neither awareness nor understanding of CLA. The tool establishes a logical, step-by-step process to build a broader and deeper collective understanding about an issue or problem in a manner that is non-threatening and non-judgmental.

Thirdly to maximise benefits, the CLA workshop needs to be followed, within a reasonable timeframe, by further workshops in which participants develop future scenarios based on CLA outputs, choose their preferred future, and develop plans to achieve that future.

Conclusion

Causal Layered Analysis is more than a theoretical framework. It is a practical methodology which is easily adapted to delivery of a workshop process. For the facilitator the strength of CLA lies in its ability to broaden and deepen discussion and understanding about an issue or problem, to move from the obvious and superficial, to the deeper levels of beliefs, experiences and emotions. This can be achieved in a non-threatening and non-judgmental way that eventually leads participants to consider a wider range of policy solutions than would otherwise have been possible.

References

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