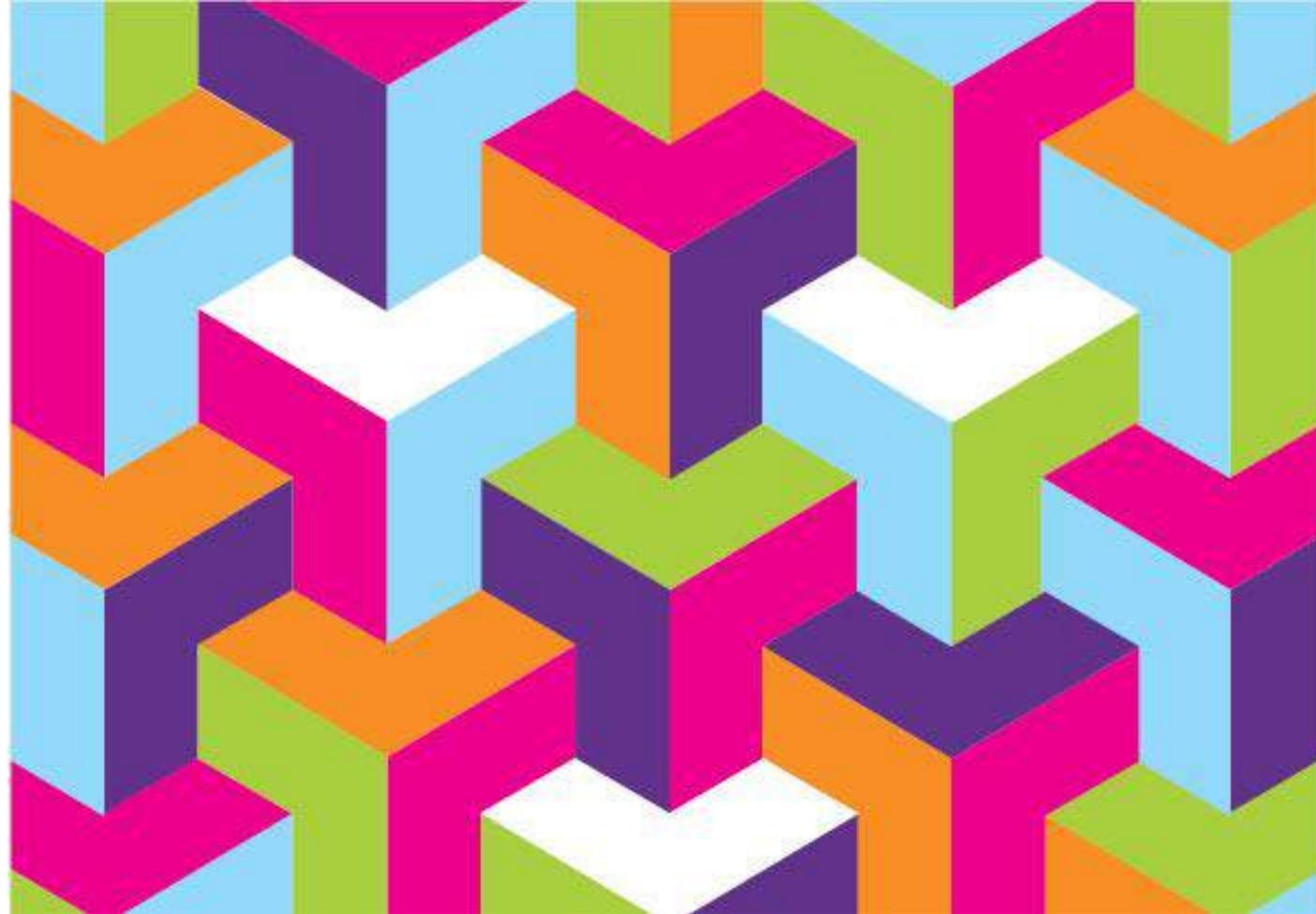




## **Mid-Life Career Reviews Toolkit**

A toolkit to support employers  
with a recommendation within  
**Age in the Workplace:  
Retain / Retrain /Recruit**





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## The Business Case

**The case for employers to enable longer working lives has never been stronger. As people live longer and healthier lives, the fundamental age structure of the labour market is changing, and this reality drives a need for employers to put more thought and greater effort into promoting longer working lives.**

If we are to maintain a sustainable and vibrant economy and deliver economic growth, businesses must start to harness the potential and capacity of the older worker. This is particularly crucial as the workplace is facing an employment gap of more than 5 million between 2012 and 2022; there are not enough younger people to fill an estimated 14.5 million positions.<sup>1</sup>

Meanwhile, employers are also facing a significant skills gap. Seventy-nine percent of business leaders believe that fast organisational growth is already leading to

skills shortages in the UK economy. Older workers provide unique skills and experiences that can add value to businesses providing an extensive bank of experience, networks, and knowledge, particularly if they have stayed within the same organisation for an extended period of time.

The majority of older people want to work longer, for identity and status, financial considerations and not least, social engagement. Despite this, approximately one million older people have been pushed out of work through a combination of redundancy, ill health or early retirement.<sup>2</sup>

After 'mid-life' defined as 50+, employment is at greater jeopardy: age discrimination rises, health problems can cause a premature exit from the workplace, caring responsibilities peak, causing some (especially women) to leave paid work, training declines and career progression stops for many.

To harness this existing talent, it's important that employers prevent an early exit from working life *and* support later life working for older employees. Mid-life career reviews are an important step in understanding the needs, interests and aspirations of older workers; helping to maintain high employee engagement and productivity across all age groups.

By enabling agile working for all generations, and ensuring that they are progressing and training older workers, employers are making the most of existing talent and reducing the need for costly recruitment.

Mid-life career reviews also enable employers to:

- Facilitate further utilisation of skills and experience
- Identify training opportunities
- Map out career progression
- Identify the agile working environment that will support all employees. including older workers.



## Mid-Life Career Reviews - Concept and Pilot Project

After the age of 50, the labour market becomes much less efficient both from an employer and employee perspective. Age discrimination rises, health problems begin to cause premature exit, caring responsibilities peak and for many, training and career progression stops. In 2006,

labour market researchers and career professionals sought to identify and address the imbalance. NIACE (The National Voice for Lifelong Learning) funded by the Department of Business Innovation Skills undertook to manage and evaluate a Mid-Life Review pilot to:

- **Test demand and need**
- **Test capacity of providers to respond**
- **Develop resources for providers and stakeholders**

The pilot project, run by providers who were able to develop their own approaches, delivered 3600 sessions to 2994 clients, divided equally between the employed and unemployed, 53% male clients and 87% White British.

### **Employed client issues identified:**

- Work-life balance
- Health
- Flexible working
- Personal finances
- Confidence 'I'm too old'
- Training and development
- Career changes
- Caring responsibilities

### **Unemployed client issues identified:**

- Gaining employment
- Training and learning
- Career development
- Volunteering
- Self-employment
- Finances
- Health
- Retirement options
- Caring

### **Findings:**

- There is a substantial demand for mid-life reviews
- Awareness and understanding take time
- Clients welcomed a review, having never discussed these issues
- Career guidance providers recognised the need and benefits and welcomed the chance to build their service offer to clients
- Career advisers recognised the need and benefits to clients.



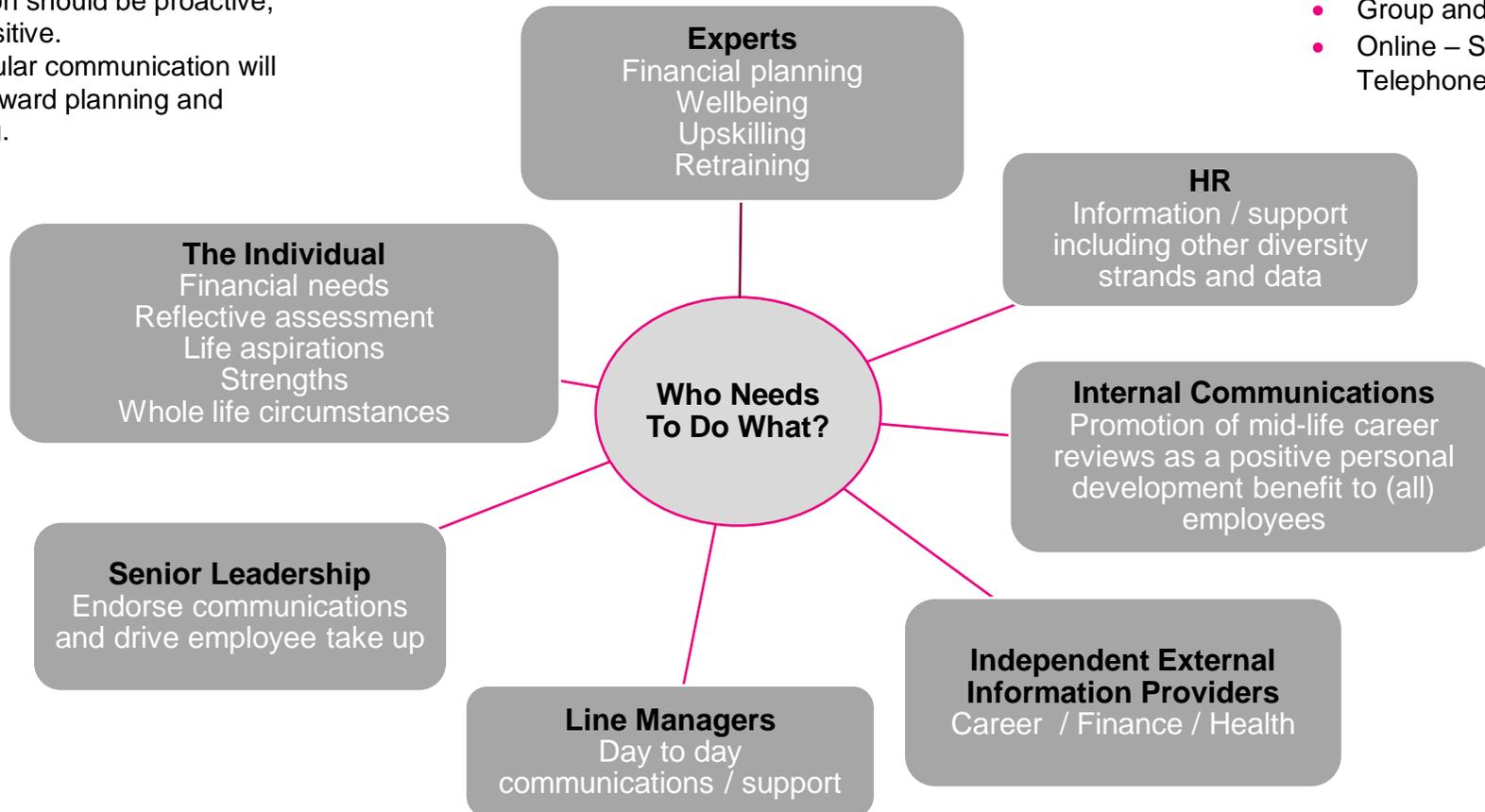
## How to Conduct a Mid-Life Career Review

### Communications Strategy

#### Best practice:

- Communication should be proactive, timely and positive.
- Early and regular communication will encourage forward planning and understanding.

### Responsibilities



### Delivery Format

#### Best practice:

- Group and 1:1 coaching
- Online – Skype / Facetime  
Telephone



## The Employee and Mid-Life Career Reviews

Because most people have no access to impartial, expert advice on mid-life issues, they leave work earlier than is good for them, their employers and the economy.

### A mid-life career review can:

- Develop skills and knowledge
- Help and develop strategies for overcoming age discrimination
- Help make informed decisions about the phasing in and timing of retirement
- Provide a better understanding of training availability to develop skills and knowledge to better sustain employment
- Provide information on the employers flexible / agile working strategy
- Review aspirations for work and life, consider how these might change over coming decades
- Review implications of working longer for health, and seek appropriate support where necessary, explore support from employer or other agencies
- Understand issues including retirement timing, flexible working, and caring responsibilities, adjustments to working patterns
- Understand own life expectancy, and its implications for work, leisure, finance and health

**Fact:** There are inequalities in those who are able to manage major life changes, including retirement. Understanding these inequalities helps organisations to provide targeted support. Groups who are most at risk include; semi and unskilled manual workers, casual workers and those dependent on welfare; those with a long-standing physical or mental disability, illness or impairment; and black and minority ethnic groups.<sup>3</sup>

During their mid-life career review the employee can consider:



### Health and Caring

- Health: Consider personal health and that of your partner
- Caring: Consider caring responsibilities for parents, children, grandchildren.



### Finances

- What are your financial position and responsibilities?
- How are you planning for the future and the unknown?



### Career Planning

- Consider strengths and past successes and how these can be built upon
- Do you have a career plan?
- What open opportunities are there?
- What are your aspirations?
- What roles will help you achieve your aspirations?
- What experience and training do you need?



### Different Working Practices

- What will your work / life look like going forwards?
- Open the conversation around working practices:  
Flexible / Agile / Smart
- Do you need to consider the financial implications of different working practices?

**Fact:** Research by Ashridge has found that HR departments are more likely to focus on 'retirement planning' but that the over-50s are just as interested in planning for their career.



## The Importance of Line Managers

Line managers are pivotal in taking the agenda forward. All line managers should be trained to have conversations around mid-life career development. The inclusion of these conversations and/or reviews should be integrated into their KPI's in order to further enhance the business imperative and encourage organisational culture change.

### In contact with the employee on a regular basis, the line manager can:

- Broaden understanding of issues linked with career and life stages and with other diversity strands
- Build awareness of the context, 'e.g'. potential talent available internally and externally, for example, unemployed over 50
- Develop knowledge and support on specific issues e.g. health conditions.

### Line managers need to:

- Feel confident in communicating with older workers. Training on utilising interpersonal skills may be required allowing them to broach and react to sensitive subjects with confidence
- Understand the various stages of life, for example, the menopause, caring responsibilities or health considerations Build awareness of the potential talent available, internally and externally, regardless of age
- Be aware of the relevant support networks for resources they can signpost employees to for specific issues, e.g. health related issues, caring responsibilities
- Have an appreciation of the myths surrounding older people in the workplace.

Line managers will need to receive training and feel empowered to undertake this critical role, whilst they should not be expected to be experts in all fields, extra support and up-skilling will be necessary to ensure they are fully conversant with their role in supporting not only their older colleagues but all their team on an ongoing basis.

#### ***Older workers are difficult and more challenging.***

**Fact:** Research shows that younger managers have strong misconceptions on the potential challenges of managing older workers.<sup>4</sup>

#### ***Older workers take more sick days than their younger colleagues***

**Fact:** Only a quarter of over 50s took time off in 2014 due to ill health compared to just under half of those aged 20-30.<sup>5</sup>

#### ***Older workers are set in their ways and will not change or be flexible***

**Fact:** 85% of employers with older workers report that these employees are open to and adapt well to change.<sup>6</sup>



## What are the Measures of Success?

Each organisation needs to map out the specific business need for retention of older workers – be it closing the skills gap, recruitment costs, cost of attrition, employee engagement – and be able to measure against these requirements.

### Measures of success

#### Employer perspective

High employee engagement across all age groups, measured by:

- Improved employee engagement scores for those older workers who have undertaken mid-life career reviews (taken from annual / regular employee engagement surveys)
- Improved rates of employee retention for older age group / reduced attrition rates of older workers
- Increased participation rates in training for older workers
- Improved promotion / progression rates for older workers.
- Productivity (if it's a measurable outcome).
- Recruitment - attracting applications from the 50+ demographic and increased hires
- Reduction in recruitment costs
- Lower rates of sickness absence

#### Employee perspective

- Does the employee feel more confident in terms of their skills and abilities?
- Does the employee feel better able and more motivated to take up learning opportunities ?
- Does the employee know more about possible work and career opportunities?
- Does the employee have a better understanding of issues including retirement timing, flexible working?
- Is the employee now able to review the implications of working longer in terms of health and do they know where to go to access appropriate support?
- Can the employee now consider and develop strategies for overcoming age discrimination?

**Fact:** People typically underestimate their life expectancy by at least four years. <sup>7</sup>



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