

Mid Life Career Review

Technical Report: Background
Evidence and Methodology

July 2015

This report has been prepared by the MLCR project team: Jane Watts, Stephen McNair, Charlotte Robey, Lorraine Casey, Caroline Berry, and Ljaja Sterland.

The authors would like to acknowledge the support of the Project's Board: Carol Taylor, Stephen North, Louca Hepburn, Nick Wilson, Alastair Thomson, Laura Bell, Victoria Butcher and Louise Proctor.

© NIACE 2015

Published by the National Institute of Adult Continuing Education (England and Wales)

21 De Montfort Street

Leicester LE1 7GE

Company registration no. 2603322

Charity registration no. 1002775

NIACE is the National Institute of Adult Continuing Education, the national voice for lifelong learning. We are an international development organisation and think-tank, working on issues central to the economic renewal of the UK, particularly in the political economy, education and learning, public policy and regeneration fields.

www.niace.org.uk

Follow NIACE on Twitter:

[@NIACEhq](https://twitter.com/NIACEhq)

[@NIACEDC](https://twitter.com/NIACEDC) (Wales)

[@NIACEbooks](https://twitter.com/NIACEbooks) (Publications)

[@NIACEhq_events](https://twitter.com/NIACEhq_events) (Events)

All rights reserved. No reproduction, copy or transmission of this publication may be made without the written permission of the publishers, save in accordance with the provisions of the Copyright, Designs and Patents Act 1988, or under the terms of any license permitting limited copying issued by the Copyright Licensing Agency.

CONTENTS

1.	Introduction	4
2.	Research and Evaluation	4
3.	Data and Findings of the Mid Life Career Review project	6
4.	Appendices	65
	Appendix A: Methodology	65
	Appendix B: Review Forms	67
	Appendix C: Links to literature review and further reading.....	71
	Appendix D: Resources	72
	Appendix E: Case Studies	73
	Appendix F: Further findings from MLCR Client Follow-up Survey	102

1. Introduction

This technical report presents the background evidence, research and case studies for the Mid Life Career Review pilot project. It accompanies and supports the Mid Life Career Review (MLCR) pilot project outcomes report.

2. Research and Evaluation

The MLCR pilot project was a substantial project and as such required a significant investment in both the research around its context and delivery as well as its basic evaluation. NIACE's research team were engaged and were supported by Professor Stephen McNair, a senior research fellow for NIACE.

The main aims of the research were to:

- assess the nature and scale of demand for a MLCR;
- gain a detailed understanding of the pilot models;
- gather feedback from key stakeholders on processes and outcomes;
- share good practice and highlight 'what works' in particular contexts; and
- report on lessons learnt to inform the development of services in the future.

The research sought to address the following questions:

- What are the career guidance needs of adults at mid-life? How do needs vary?
- Who has taken part in a MLCR?
- What models of a MLCR have been piloted? How well have they worked?
- What approaches have been used to engage clients and with what success?
- What is needed to effectively meet the mid-life career guidance needs of adults?
- What have been the immediate impacts on clients, advisers, pilot sites, others?
- What are the key messages for policy-makers and practitioners?

Methodology

The project employed a mixed methods approach. Qualitative data was gathered from partner briefings and workshops, from case study visits, interviews with managers at partner organisations and monthly and final reports. Quantitative data was gathered from monthly reports and monitoring forms, the adviser survey and from interviews with managers at partner organisations.

Interviews were largely conducted by telephone. Client and adviser participation in the case study visits was very important in informing the research team about the detail of practice.

The evaluation used an interactive formative approach to improve the project as it progressed, rather than just feeding back after it was over.

Analysis of data was carried out by the NIACE research and project team. An external organisation, CfE, was commissioned to support NIACE in the analysis of the quantitative findings, specifically focusing on cost and benefits of the pilots. They worked closely with the NIACE research team and their findings are incorporated into this report¹.

In total, NIACE received data on over 3,600 MLCR sessions delivered to 2,994 clients. However, it is likely that pilots delivered more sessions to a greater number of clients than these figures indicate, given the issues that some pilots had ensuring that clients and advisers completed the relevant paperwork and submitting the correct data.

Pilots were asked to submit data on client demographics and the topics discussed during their review. Two different forms were developed for the collection of this data: a 'pre-review' form for client demographic information and a 'during review' form for information about the review session². Only the 2574 clients whose 'pre-review' and 'during review' information was submitted to NIACE were included in the data analysis.

However, many of the data submissions were missing some information where advisers did not discuss certain issues or gain some information from clients. Furthermore, the data from Unionlearn, which covered 770 clients, was relatively sparse due to the nature of their data collection activity. Consequently, the base numbers for the following data tables vary greatly and each table should therefore be used as stand-alone information.

In September 2014, approximately one year after the start of the delivery of the Mid-life Career Review (MLCR) project, NIACE carried out a follow-up survey with MLCR clients. The aim of the survey was to find out what impact the MLCR project had had on clients. For reasons beyond the project's control, the response rates were low. However, the profile of respondents matched closely the client population and can be taken as broadly indicative³.

1 A fuller description of the methodology can be found at Appendix A.

2 Copies of these forms can be found at Appendix B.

3 For reasons of confidentiality, follow up contact had to be made through the MLCR providers. At the time of follow up, National Careers Service partner staff time was constrained by the work involved in bidding to renew their contracts. Furthermore, computer systems were also being replaced, making access to records more difficult.

3. Data and Findings of the Mid Life Career Review project

What is a mid-life career review (MLCR)?

At the outset we had some specific ideas about what a MLCR was but not how it might be delivered. The key factors of a MLCR were that it should be about the person's whole life, taking into account their job and learning needs at the same time as their life circumstances whether health and caring related, financial, as well as motivation and interest in making informed decisions. The intention would be that reviews would, as far as possible, be rooted in a person-centred approach, and within the context the provider worked in, whether in the formal guidance services, in learning or in the workplace.

Models of delivery

The project did not prescribe a model for how to deliver a MLCR; partners developed and piloted their own approaches, following the initial briefings by the NIACE team. The project was keen to engage a range of partners who would trial different delivery approaches in order to explore what works well and why. During the course of the pilot most partners carried out reviews on a one-to-one basis, mainly using structured interview⁴ processes, directed by the advisers, and also undertook some group delivery; however the extent to which partners employed each approach varied considerably, with partners utilising these approaches in different ways.

The 17 organisations taking part in the project varied in their geographical scope; some had a very local focus while others operated across one or more regions. The telephone service provider had a national reach.

A number of National Careers Service prime contractors opted to use their own direct delivery team only, whereas others worked in partnership with one or more of their sub-contractors and other stakeholders. In a few cases the MLCR work was led by a sub-contractor. Across the pilot sites, the number of advisers directly involved in delivery varied from two to 60⁵.

A range of delivery approaches were trialled including individual sessions (in person and/or by telephone) and group workshops. Most pilot sites employed a mixture of approaches. The group workshop approach proved particularly popular.

The approach to group work varied across the pilot sites in a range of ways, including the length of session and the number and type of participants. For example, one pilot delivered a group workshop split in to two sessions, held one

4 This was true only for National Careers Service provision, and became less the case where multiple/follow up sessions were offered to clients.

5 We do not have a record of the total number of advisers involved, but estimates from the interviews with pilot providers would suggest approx. 200 advisers, excluding union learning reps.

week apart and participants completed some 'homework' in between. Several pilots developed 'core content' for the group session and ran similar sessions on a regular basis (e.g. weekly). One partner identified 8 different groups⁶ to work, with the approach varying to suit members of each group.

All partners planned to conduct some follow up work with clients, in most cases by telephone or email. It was anticipated that some clients would require more follow up support than others. For some clients, a further one-to-one National Careers Service session would be appropriate, or if made by a non-National Careers Service type of provider, a client being referred to the National Careers Service for the first time.

Several pilots developed resources specifically for clients during the lifetime of the project and these were collected and are included in the resource platform for practitioners⁷.

Client 'journeys' varied widely; for example, they included one or more one to one sessions in person and/or by telephone. A small number of sessions were conducted one to one via email, sometimes followed by further email contact. Group sessions were held, with one or more per client. Other clients experienced a combination of any of the above methods either once or a number over a period of time.

The content, length and format of sessions did vary across partners, even where the mode of delivery (e.g. group) was the same, illustrated by Tables 1 and 2 below.

Table 1: Delivery mode

Delivery mode	%
One-to-one	52
Group session	34
Telephone	13
Email	1

Base: all sessions = 2846

Table 2: Review Length

Length of review	%
Half an hour or less	13
Between half an hour and an hour	66
Between an hour and an hour and a half	15
Between an hour and a half and 2 hours	11
Longer than 2 hours	32

Base: all sessions (excluding those delivered by Unionlearn) = 2279

⁶ The groups included, for example: carers, newly redundant professionals, women, clients with mental health issues. These were already in groups in the community.

⁷ See Appendix D.

Feedback from partners highlights that the different approaches to delivering MLCRs each have their strengths and limitations. The benefits for clients of one-to-one support can include: support which is tailored to their needs and priorities; the opportunity to talk with someone in-depth and in confidence; and, a positive challenge to help the client discuss concerns.

One client who took part in a two hour face-to-face review with a careers adviser was very positive about the experience and had recommended it to colleagues:

'It wasn't just about accepting what people were saying but... challenging you and questioning you by probing to get you to deep think... I did recommend it... and said it would be really beneficial for you, it's very focused on you and looking at how you can move forward and looking at your personal goals not just within your career but how your personal life may impact on the decisions you need to make.' Client

Effective one-to-one support is dependent on the skills of the adviser in being able to create a good rapport with the client and a space in which they feel safe and supported to discuss personal and potentially sensitive issues. As one client said:

'It needs somebody that creates the environment where you feel comfortable enough and trusting enough to be able to open up to somebody. If you're not able to do that I don't think you're going to get very much out of it.' Client

'You feel very vulnerable when you're in that situation. I certainly did anyway and you don't want to feel stupid. So it's important to have somebody that's non-judgemental, is willing to listen but is also willing to probe and go that little bit further to explore how you're feeling... you can't move forward properly until you've got right down to the real feeling.' Client

For one to one reviews, one pilot developed a two hour session which although valuable was considered unsustainable outside of the project. Shortening the session whilst retaining a holistic approach, focused on a MLCR client, had proved challenging; 'What do you take out?' being one of the questions raised. Balancing a client-centred approach with planning and resourcing the session might also prove challenging for some providers. Some National Careers Service advisers/pilots seem to have struggled initially to make the review distinctive from their existing National Careers Service offer, which is also one to one. Although both are rooted in good guidance practice, the main differences between a standard National Careers Service session and an MLCR session appeared to have been the length of time offered, the wider possible areas for discussion and open outcomes; employment options being just one among many considerations for the client in MLCR, but are key targets for measurement in a standard session.

Taking part in a group session enables clients to meet people and develop more of a network to widen their social circle and feel less isolated through peer learning,

support and challenge. Well-facilitated group work can showcase and develop a range of employability skills including the opportunity to raise and discuss common areas for development e.g. digital skills. The sense of community generated was important for the clients.

'Everyone was incredibly supportive of each other. There was great mentoring going on and also networking. It was a community bond really. Everyone was in a similar situation. For me the most beneficial part of it was opening up discussion and allowing it to flow... things could go off a bit more fluid.' Adviser

'A lot of them seemed to get a lot out of group work experience; that the whole networking, peer support and the fact that they're not on their own... the struggles they're facing is not just for them they impact on a lot of other people.' Adviser

'The clients were saying they had been used to working in individual units, just appearing at the Job Centre. But now they knew people... a sense of community, not so isolated anymore.' Adviser

Partners highlighted what needed to be in place for group work to be effective. The skills of advisers are key in being able to manage a group (which could be very diverse), act as facilitator, and creating a space where people feel at ease to contribute and able to trust each other. The dynamics of the group are also important, again requiring expert facilitation.

A further challenge for some partners was low attendance at group sessions; as community educators are aware poor attendance can affect group morale. A pattern of 'no-show' is familiar to guidance providers, often occurring where clients are not sufficiently aware of the potential benefits of attending or where a complex life situation has intervened.

Combining one to one and group delivery

The evidence suggests that there should not be one single model of a MLCR. A number of approaches have proved effective in supporting MLCR clients in a range of ways. The value of clients being able to access one-to-one support and take part in a group session was highlighted.

'A good way of going about things was to allow people an opportunity to explore things individually as a result of having their interest sparked or inspired by a workshop and then being able to get individual advice and individual guidance, and also the opportunity for people to be able to learn from each other. So I think the opportunity to do both was quite complementary.' Adviser

'The group gives an opportunity for people to spark off each other. The ability to share, the ability to understand that they are not on their own, the

opportunity to air opinions and discuss them with people who are going to understand... what it doesn't do is address individual concerns... the one-to-one delivers that 'this is how it works for you'... so the balance between the two is really strong.' Adviser

'You need that follow on definitely. To pick up points they maybe wouldn't raise in a group. There were some individuals that were very under-confident and you felt maybe it was more conducive for them to meet on a 1:1. It's the balance between group and 1:1 work... amongst the group even those that came across as very confident, when you started having 1:1s they were very different.' Adviser

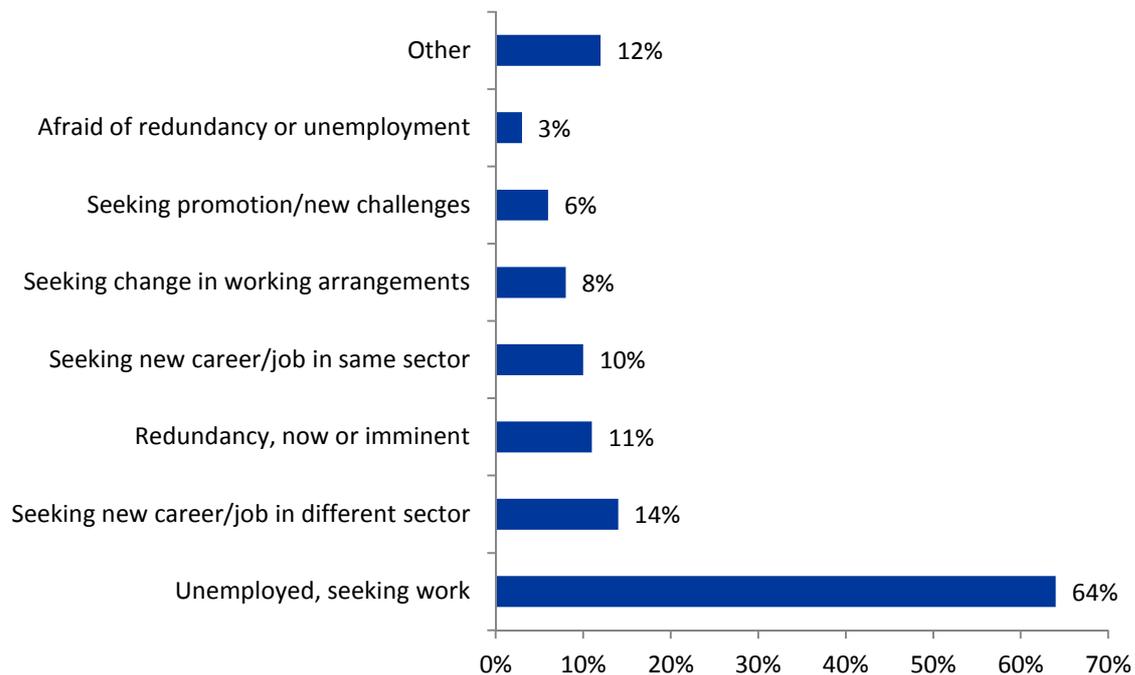
The project provided the opportunity for pilots to explore 'what works'. It was a learning process and some pilots adapted and developed their delivery approach throughout the delivery phase.

'As part of the development of the course, each session I delivered I asked for extensive feedback at the end of it and started to develop it week by week as I went on.' Adviser

Meeting the needs of clients

Clients engaged with the MLCR project for a wide range of reasons, and discussed a variety of issues during their sessions. The most common reason that clients gave for taking up a MLCR was that they were unemployed and seeking work (see Figure 1 below). This is unsurprising given the relatively high proportion (47%) of unemployed clients who participated in the project, which in turn may reflect the fact that some of the providers were co-located with Jobcentres, making referral relatively straightforward. Some of the employed clients took part in the pilots through union learning reps or workplace learning advocates and may not therefore be a typical sample of employed people, many of whom do not work in places where these types of representative exist.

Figure 1: Reasons clients took up a mid-life career review



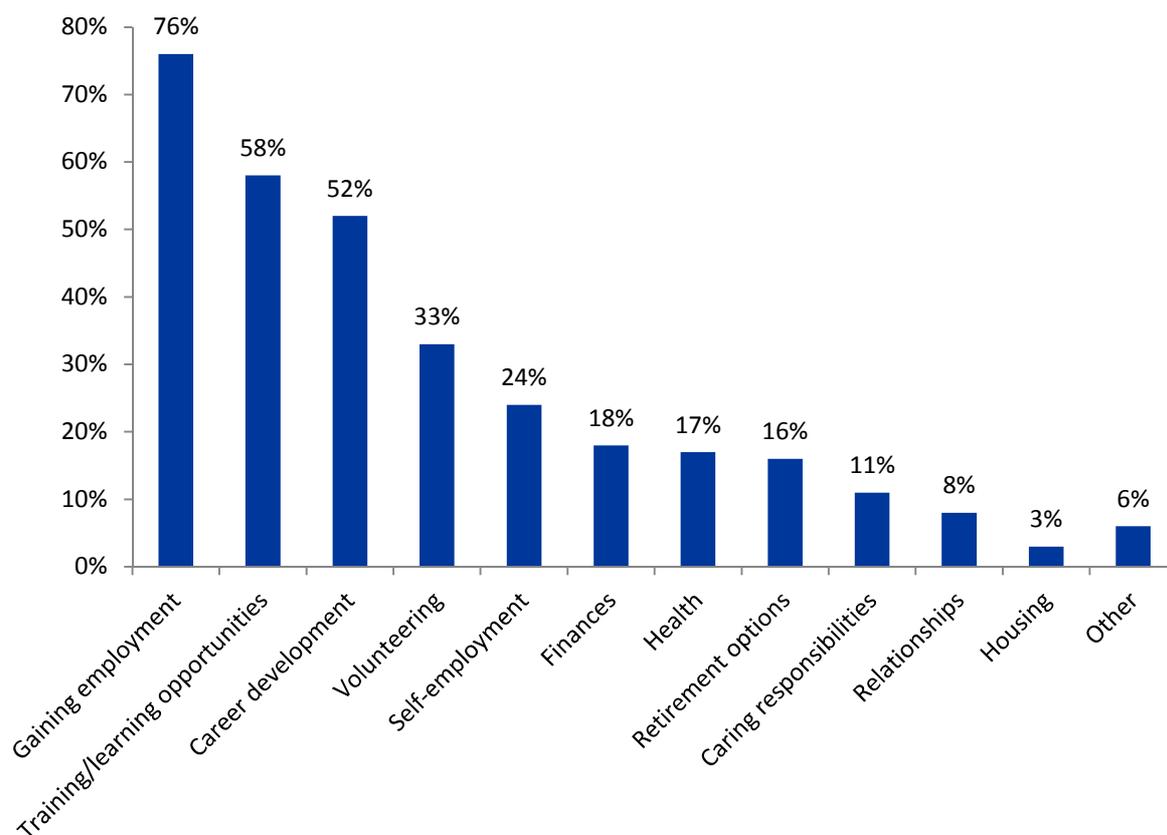
Base: all sessions (excluding those delivered by Unionlearn) = 2405

The advisers interviewed as part of the evaluation commented that once they had started discussing clients' situations in more depth, it became apparent that these motivations to engage were underpinned by a wide range of issues which clients faced in relation to gaining or maintaining employment.

'... when people realise that they are in a safe environment with someone who's really listening and can show them empathy, then you tend to find that perhaps more personal issues come out and the disclosure's quite high.'
Adviser

These barriers are reflected by the range of topics covered with MLCR clients during their sessions, as shown by Figure 2 below. The most common topic still focused on gaining employment, but over half of clients also discussed training or learning opportunities or career development, and a third discussed volunteering. Other topics which clients discussed in depth included self-employment, finances, health, retirement options and caring responsibilities.

Figure 2: Topics covered with mid-life clients



Base: all sessions (excluding those delivered by Unionlearn) = 2405

Advisers involved in the project adapted their sessions according to clients' needs. For example, many spoke about talking in more depth about labour market changes and job applications for those who were unemployed, while focussing more on planning for the future with clients in employment. Other considerations included whether the resources used were appropriate for clients' skills levels and the best format to use for specific groups.

'I adapted some group work sessions according to the stated need of people in the group, e.g. discussion on self-employment. This was needed to ensure people had faith in the possibilities of further discussion and the need for additional research for themselves.' Adviser

'Carers I approached online by email as it was difficult to get people to come out from home to groups.' Adviser

'Unemployed customers required more advice on getting a job whereas employed required more advice on planning for the future.' Adviser

Confidence and self-esteem

Advisers tended to find that underlying all of the above issues was a lack of self-esteem and confidence in clients' ability to secure a job if unemployed or get a new job for those who were employed. For those who were unemployed, this lack of

confidence tended to be the result of being made redundant or of multiple unsuccessful attempts to secure employment. Both employed and unemployed clients found it difficult to recognise the transferable skills they had developed over the course of their working life which could be addressed through the MLCR process. Poor awareness of transferable skills often affected their confidence to apply for higher level jobs or promotions.

'Most feel demoralised, undervalued and written off. A lot of work is required during the session to enable them to see their worth and to take a positive or more objective standpoint when reviewing clients.' Adviser

'There are some issues around confidence which clients who are at a mid-point in their careers seem to have. It is interesting that few recognise their experience as being the asset that it can be and that they do not always appreciate the transferability of their skills to other areas.' Project manager

'A lot of the people seemed to have real confidence issues. That fed through every single person to some extent. People I saw who were more longer term unemployed that 'what's the point' kind of attitude was starting to come through because of the amount of applications they had sent off and hadn't received anything back.' Adviser

Well-run MLCR approaches can address some of the issues raised, but cannot in the end solve problems of labour supply and demand.

[Age discrimination and perceptions of employers and individuals](#)

One of the most common issues raised by MLCR clients was perceived or actual experience of age discrimination. The majority of advisers felt that clients' confidence to apply for jobs or views of their career options were negatively impacted by their notion that employers prefer younger candidates and employees. Futures Nottingham conducted a survey with their MLCR clients and found that, of the 115 respondents who responded:

- 79% felt that employers preferred younger workers;
- 43% felt that employers were concerned that older workers lacked digital/IT skills;
- 40% felt that employers think older workers have outdated skills and/or qualifications;
- 35% felt that employers viewed older workers as more expensive;
- 26% felt that employers thought older workers were more likely to be off ill; and
- only 3% felt that employers thought older workers were unreliable.

For some, these negative perceptions by employers were compounded by the focus of the media on young unemployed people, which reinforced their ideas that they were competing with younger, cheaper and 'more qualified' job applicants. By this, clients meant that young applicants had more formal qualifications which were valued by employers, so, although clients felt they could do a job, they didn't have the piece of paper to prove it to a potential employer. Advisers therefore had much

to do to overcome these perceptions of age discrimination and show MLCR clients that they had the skills and experience which many employers value.

Gaining employment

For clients who were unemployed, unsurprisingly, gaining employment was a common topic for discussion in reviews. Advisers found that MLCR clients needed a lot of support in developing their job application and interview skills. This was particularly the case for clients who had been in the same job or with the same employer for a long period of time and therefore had little knowledge of the modern job market or job search techniques. In particular, clients lacked confidence in using digital technology and social media to search and apply for jobs.

'Clients were particularly interested in the role of networking, especially using social media, when finding work. One client explained that she had signed up to LinkedIn and as a result, past colleagues had contacted her. This made her realise that although she hadn't found a job as yet, social media was an effective networking tool. Hearing this from one of their peers encouraged the rest of the group. We were able to supplement this anecdote with hand-outs outlining the ways in which social media can be used (e.g. twitjobsearch and use of hashtags to do searches on Twitter).'' Project manager

As illustrated above, MLCR clients found the group sessions valuable in sharing their experiences of searching and applying for jobs. This peer support often helped them to overcome the isolation they might have felt about their situation. Advisers working with offenders found that this was particularly effective in generating a more positive mind-set amongst their clients.

'The clients also told us that one of the key reasons they wanted to attend the MLCR was because of a desire to meet others in the same situation. This highlighted to me the importance of support networks for older people looking for work.' Adviser

'The chance to network with each other continues to be particularly useful as people stated that they felt lonely job seeking by themselves and felt 'lifted' by sharing their experiences.' Project manager

A number of advisers found that clients were dissatisfied with the way in which they had to apply for jobs in order to claim Job Seekers Allowance. These clients had to apply for a certain number of jobs a week (often up to 30) which meant that they struggled to submit high quality job applications or even consider whether they met the job requirements or whether the vacancies matched their career aspirations.

'[Clients have to] mindlessly send off their CV to lots of vacancies without due consideration to whether the job is suitable and without tailoring their CV to match the job. They just click on the submit button to meet the JCP requirement to record a certain number of applications.' Adviser

The MLCR approach can help to target support but needs a full partnership working between JCP and other providers including the National Careers Service.

Training and learning needs

Over half of MLCR clients discussed training or learning opportunities during their session (see Figure 2 above). The most common issue raised was poor IT and digital skills. Clients often felt that this was a significant barrier to them gaining employment. In particular, many clients lacked confidence in using social media to search and apply for jobs as they did not use social media in their daily lives. This led to some unemployed clients feeling intimidated at the thought of competing with younger applicants who they felt were more confident with IT and social media.

Consequently, 26 per cent of clients were signposted to a learning provider from their session and 15 per cent of clients planned to explore learning or training options independently following their review. In addition to this, one pilot partner found that some of their clients were updating their maths and English skills in order to go to college, get a new job or change career altogether. Anecdotally from the partner workshops, this identification of low level of English and Maths was widespread but this did not emerge from the survey data.

Another common issue in relation to training and learning was the lack of relevant qualifications amongst clients in mid-life. Advisers tended to find that those who had been with the same employer for many years had not been through any competitive processes which required them to have nationally recognised qualifications. Despite the findings that new formal qualifications made little difference to older people's job search⁸, for some of the MLCR clients this was perceived to be a factor; once these clients had either been made redundant or had started looking for a change of job, they found that, although they had the skills and experience required, their lack of formal qualifications was a real barrier to entering new employment. In some cases this was compounded by clients' difficulty in identifying their transferable skills.

'The biggest barrier I've found is a lot of people have been within the same organisation for many years. They had the in-house qualifications but if you look at the labour market now you need to have all that experience but it's also the piece of paper as well to get you through that short listing process.'
Adviser

'Another issue to highlight is that some clients have found it difficult to appreciate the transferability of their skills and how existing skills could be utilised in new contexts.' Project manager

Advisers also found that clients who had spent the majority, if not all, of their working lives in manual positions needed to find alternative employment due to health issues. These clients faced the daunting task of retraining for a different sector when

⁸ See p.18

they often had not engaged in any kind of training since leaving full-time compulsory education.

Clients in custody also discussed their skills and training opportunities, but this was often focussed on what skills they had which could make them a productive member of society. These clients could then identify what skills they needed to develop in custody to make them more employable on release.

Career opportunities and changing working arrangements

Over half of clients discussed their career options and opportunities with advisers. The ways in which clients wanted to develop their careers varied greatly. Six per cent of clients were seeking a promotion at work⁹. Some of both the employed and unemployed clients wanted to continue at the same level until retirement.

Eight per cent of clients were seeking a change in their working arrangements, for example, to be more flexible, part-time, work from home. The reasons for this varied. Advisers found that many MLCR clients in highly paid jobs and with high levels of educational attainment were hoping to move into less stressful or part-time work. These clients often felt that, although they wanted to continue working, they wanted less pressure at work so they could focus on their leisure activities. Other clients were looking to change their working arrangements because of a change in their personal circumstances, such as gaining caring responsibilities or developing health issues.

Advisers also discussed clients who were looking to pursue a different career path, and for example, who were in manual work which they could no longer sustain or public sector positions such as uniformed services where early retirement has traditionally been compulsory or common. For these clients, much of the discussion about their career options focussed on re-skilling or up-skilling to enable them to move into a different sector.

Volunteering

Volunteering was discussed by a third of clients (see Figure 2 above) and was seen by some unemployed clients as a potential way of them re-entering the labour market. This was also key for offenders who were keen to explore ways in which they could gain employment on release. For those in employment, volunteering was seen as an important way of passing on their knowledge and skills. Some clients commented that this would help them to feel that they were still an important and valued part of society. However, in all of these situations clients were aware of the need to start or continue to earn money. Thirteen per cent of clients were signposted to a voluntary or community organisation and 15 per cent were planning to explore volunteering options after their MLCR.

⁹ By comparison, among employed respondents aged 50 – 75 in the EHRC's 2009 survey, 11% would have liked a promotion.

Finances

The issue of finances was raised by around a fifth of respondents (see Figure 2 above). In general, advisers tended to find that clients who were unemployed or self-employed managed finances on a day-to-day basis and often did not have pensions or savings. Anxiety around pensions and whether they had enough money to live on in retirement was a common issue amongst these clients. For them, paid work was seen as necessary in order to meet their financial commitments and they often spoke to advisers about whether they could sustain their current lifestyle.

Clients in employment also often raised financial issues. Some had experienced significant transformations in their wider lives, such as a divorce, and had not yet considered how they would be able to finance their futures. Others had considerable fears over redundancy given their long mortgage commitments.

Financial advice was one of the topics where outward referral would have been necessary for some clients and this was much discussed during initial briefings and caused some concern to advisers. In fact, only 1% of clients were referred onto a financial adviser or service. Given what is known about the lack of financial preparation for retirement in the general population, this is a surprisingly low figure. Does this perhaps reflect some advisers' anxiety about their competence and legal position in relation to this topic? Our evidence suggests that it was clients who did not wish to prioritise this topic, but it would have been interesting to know more about their reluctance. We would have expected to see further use of outward referral on these issues.

One adviser commented:

'The individual is reaching pensionable age and wanted some support with choosing the right annuity/referred to the company financial adviser for guidance and support.' Adviser

Health and disability

Health problems and disabilities were discussed with 17 per cent of clients (see Figure 2 above). As mentioned above, many clients were looking to retire from manual occupations due to health problems. Some of these clients found a mismatch between the type of work they were able to do and what jobs were available in the local area.

'In many of the areas where we run workshops there is a mismatch between the type of jobs available [and] clients [being] physically unable to see themselves being able to do the work. For example, there is a high level of warehouse jobs but clients suffer with back or breathing conditions.' Project manager

Advisers found that, for those in employment, any discussion of a client's health concerns was a result of clients wanting to stay productive in the workplace when

faced with a specific illness or condition. This acted as a strong motivator for clients to engage with the Workplace Learning Advocates pilot in particular.

'I got involved because I knew it would be an asset to me. Any help I can get with my wellbeing, whether it's exercise or diet that is the most important thing and if it's offered to me I will try and take it up. I want to work. I don't want to be sitting in the house with my leg up.' Client

Retirement

As figure 2 above shows, less than a fifth of clients discussed their retirement options during their MLCR session. This may have been for a number of reasons, including poor awareness:

'Some of the customers we've seen were a little confused about the retirement age. People were thinking they could retire at 60. Think they got a bit of clarity. [I had a few] people say to me 'no one has talked to me about retirement. It's all about getting work or staying in work'.' Adviser

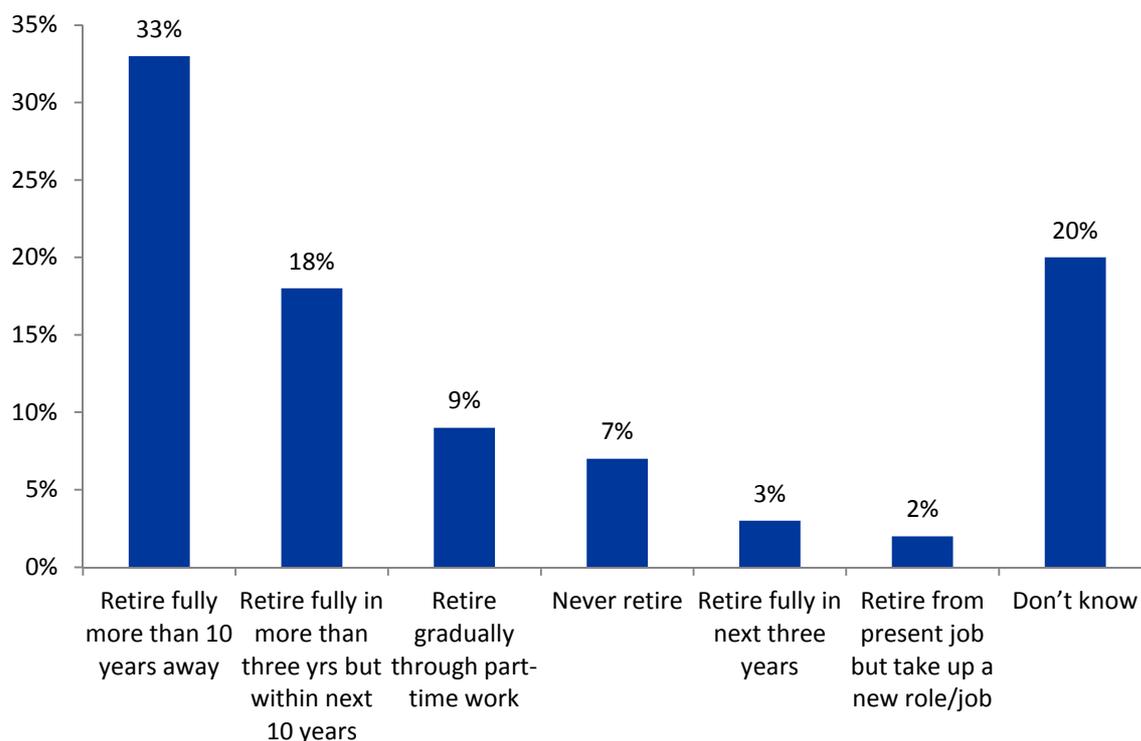
A further reason may have been due to one-to-one sessions being largely guided by clients' needs. While group sessions tended to have a structure and topics for clients to work through and discuss, one-to-ones were more flexible and focussed on clients' individual needs. This was particularly the case if clients had a group session and then a one-to-one session: they would identify their particular problems through the group discussions then get specific advice on these in a follow-up one-to-one; for example, Mary Ward centre took this approach.

As the majority of clients were unemployed, advisers found that they were more concerned with finding work than considering their longer-term options. In general, advisers found that the majority of clients were focussed on more short-term aims, such as securing a job in a challenging economic climate, and therefore struggled to envisage what retirement might involve for them. Clients often knew that they wanted to continue working, and although some had an idea about what they would like to do, the majority were unsure how to do this.

'A lot of people wanted to focus on what was happening, rather than touch on what could happen in the next ten to fifteen years.' Adviser

Furthermore, only around three-fifths of clients disclosed their retirement expectations to their adviser (see Figure 3 below). A third of MLCR clients were anticipating that they would retire fully more than 10 years in the future, with only three per cent anticipating that they would retire within the next three years. However, one fifth of clients had no retirement plans.

Figure 3: Retirement expectations of mid-life clients



Base: clients who discussed retirement expectations = 1500

Note: clients could have more than one retirement expectation

MLCR Clients' attitudes towards retirement often depended on their financial situation. For example, those with minimal financial burdens tended to not see the appeal of the 'cliff-edge' of retirement and were more likely to seek advice on how they could move into less stressful occupations which they would enjoy doing. In contrast, those who were in a less secure financial position felt that they would need to continue working for as long as they mentally and physically could.

'For many of the people I spoke with the instability surrounding the economy was a huge factor, not just in terms of their own personal plans but it's to do with the value of pensions funds; the levels of unemployment; is there going to be any change to the state pensions; access to health care... This unpredictability has shaken people's ideas about what retirement is going to be like.' Adviser

Caring responsibilities

Although only discussed by around a tenth of clients (see Figure 2 above), caring responsibilities were still an important issue for MLCR clients, particularly women. One pilot found that they saw a noticeable number of female clients who had taken time out of work to bring up their children. They often wanted advice on returning to work and balancing this with childcare responsibilities. Some women found this to be an exciting prospect and saw it as an opportunity to think about and start a career. For clients who cared for other family members, their caring responsibilities often posed time and financial barriers to gaining or maintaining employment.

Client needs not met by the project

Since MLCR clients have a wide range of needs which may affect their careers or ability to work, it is unsurprising that advisers felt they were unable to adequately address some client needs. The majority of these needs were outside of advisers' control but meant that they could offer little in the way of direct support to clients. These included issues around long-term health problems and disabilities, availability of relevant local learning provision, and low IT skills which limited the resources that clients could use.

'There were two clients who presented as being medically retired. I found it difficult to engage them in certain questions, such as their perceptions of employers and what their priorities are right now and how they might change as they moved further away from age 50 and towards 'traditional' retirement age. When asked about this, the clients felt their life and career chances significantly limited and impaired, and felt like they were unlikely to re-engage in the notion of career.' Adviser

A minority of advisers surveyed or interviewed felt that they were not very well equipped to find out about some specific learning and skills opportunities available locally. Partnership working will be critical in finding good solutions for clients. The on-line resource library developed as part of the project helps to address this lack of information. However, partners were sharing information throughout the project and the project team was also available to provide further advice, so it is of concern that even quite basic information was not available.

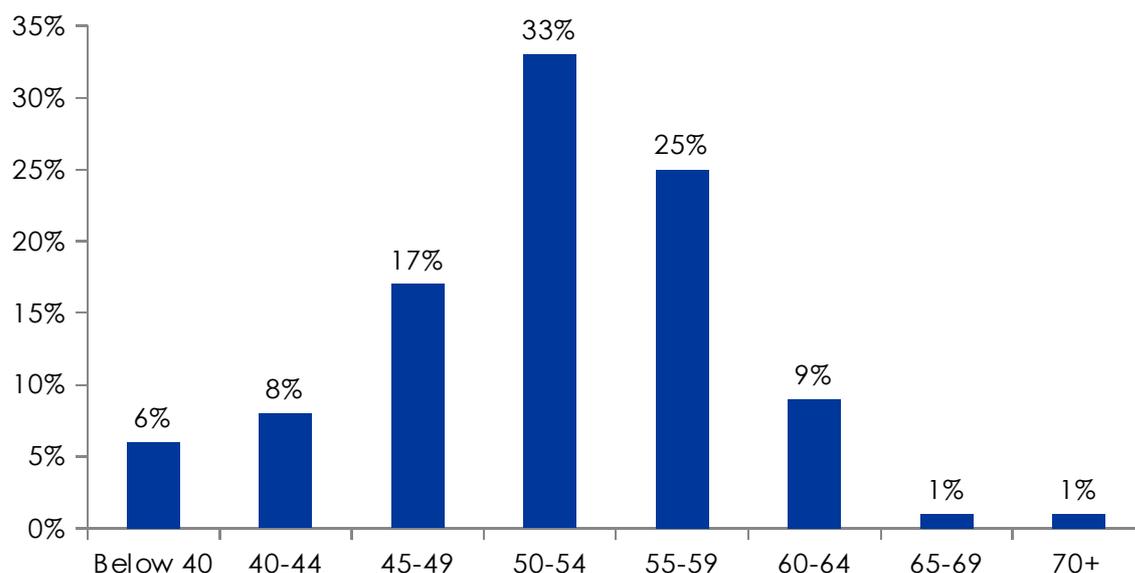
In other cases, advisers felt they could not give adequate support to clients because they lacked the knowledge or information they required. These needs included higher level labour market information, age discrimination, pensions, housing and caring responsibilities. In these situations, advisers signposted clients onto services which could provide more specialist information and advice, for example, the Money Advice Service, a Credit Union, a physiotherapist and a carers' organisation. The project did not expect every adviser or lay-adviser to be able to address each and every question, but did expect that advisers would be able to refer accurately.

Review participants

In total, pilots delivered at least 3,616 MLCR sessions to 2,883 clients. Generally, pilots worked within the suggested definition of 'mid-life', aiming to engage clients aged from around 45 plus, with potentially twenty years of working life left. However, around a quarter of pilots broadened this definition to include any clients who were at a key transition point and may find the project useful and relevant to their circumstances, for example, clients who were facing or had recently experienced redundancy.

This flexibility around clients' age is demonstrated in Figure 4 below. The majority of clients were between 45 and 59 years old. However, a small proportion of clients were aged 65 or over and six per cent were under 40 years old.

Figure 4: Age of clients



Base: all clients who declared their age = 1862

Fifty three per cent of clients were male and 47 per cent were female. This slight gender bias may be accounted for by some pilots' focus on certain industries or locations which are male-dominated. For example, one pilot worked with a group of miners while another ran group sessions with offenders in a men's prison. However, this is a more even balance than that generally achieved by the National Careers Service, where 57 per cent of customers were male and 43 per cent female between April 2012 and March 2013¹⁰.

The majority of clients who engaged with the MLCR project identified themselves as white British (87 per cent). In comparison, 79 per cent of those who had a face-to-face session with the National Careers Service between April 2012 and March 2013 were white British. Over the same period, 64 per cent of National Careers Service telephone customers were white British¹¹. Twenty-five per cent of clients identified themselves as having a disability. This compares to 20 per cent of face-to-face and 12 per cent of telephone National Careers Service customers¹².

The proportions of clients who were unemployed and employed were roughly equal (see Figure 5 below). The proportion of unemployed clients is likely to be the result of many clients being signposted or mandated by Jobcentre Plus to have a National Careers Service intervention. This was the most common way in which clients heard

10 BIS (2013) National Careers Service: Satisfaction and Progression Surveys: Annual Report (April 2012-March 2013 fieldwork). London: BIS.

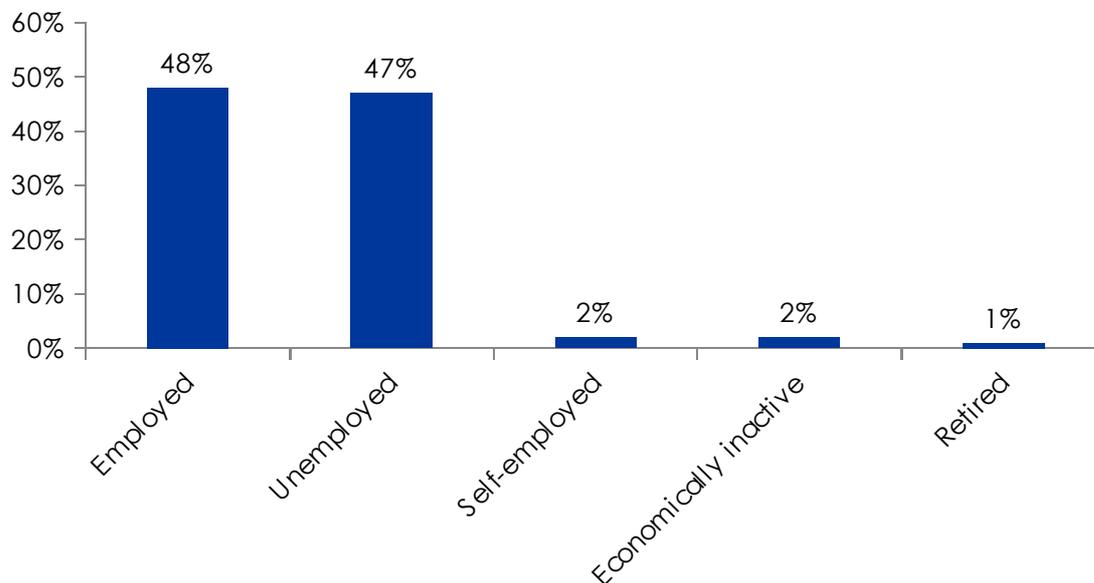
11 BIS (2013) National Careers Service: Satisfaction and Progression Surveys: Annual Report (April 2012-March 2013 fieldwork). London: BIS.

12 BIS (2013) National Careers Service: Satisfaction and Progression Surveys: Annual Report (April 2012-March 2013 fieldwork). London: BIS.

<https://www.gov.uk/government/publications/national-careers-service-satisfaction-and-progression-surveys-2013-to-2014-report>

about the project but it should be stressed that MLCR was never part of a mandated process; all the participants in the pilots took part voluntarily and in addition to any mandated activity that should have applied.

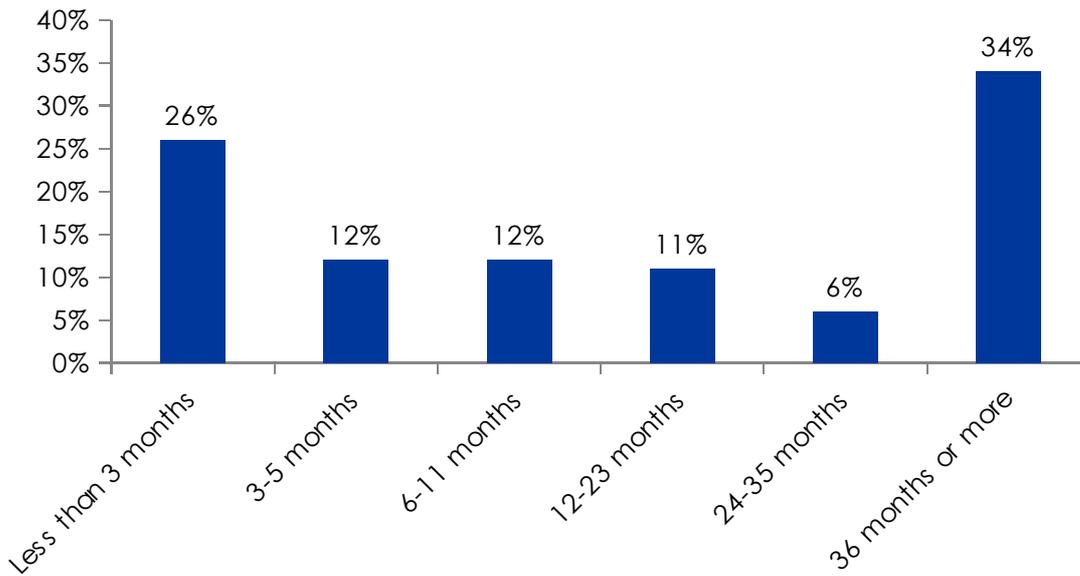
Figure 5: Employment status of clients



Base: all clients who declared their employment status = 2519

As Figure 6 below shows, two-fifths of unemployed clients had been unemployed for two years or more. However, a similar percentage had been unemployed for less than six months. Looking at the data for longer term unemployment in more detail, there was some variance amongst the providers who worked with unemployed people. Unsurprisingly, the voluntary organisation whose main work is to work with unemployed people at distance from the labour market had 62% people in this category, but the adult learning provider reported 41% in this group. Of the National Careers Service providers figures ranged from 3% to 52% in the group unemployed for two years or more. There was less variance between providers in terms of unemployed clients unemployed for 6 months or less – with the exception of the voluntary organisation which focused mainly on the longer term unemployed clients.

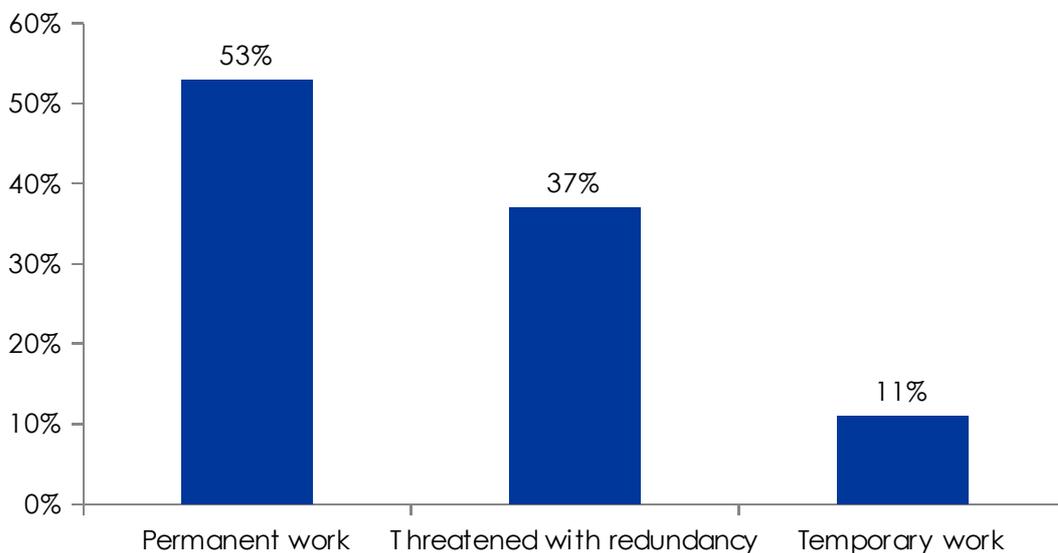
Figure 6: Time unemployed clients had spent out of work



Base: all unemployed clients = 1183

The majority of these clients, who were employed at the time of the project, were working for 16 or more hours per week. However, over a third of clients were either at risk of redundancy or under formal notice of redundancy and 11 per cent were in temporary work (see Figure 7 below).

Figure 7: Security of clients in employment

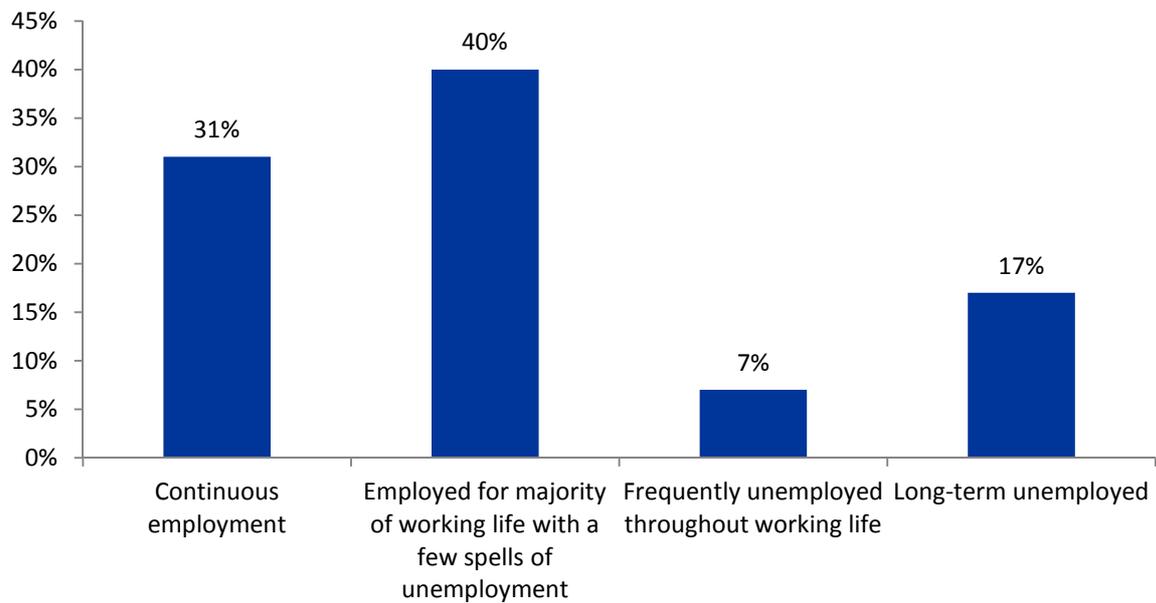


Base: all clients in employment = 449

As well as giving their current employment status, clients spoke about their employment history during their MLCRs. As Figure 8 below shows, clients were most likely to have been employed for the majority of their working life with a few spells of unemployment, or to have been in continuous employment. However, over a fifth of

clients had been frequently unemployed throughout working life or identified themselves as being long-term unemployed.

Figure 8: Employment history of clients



Base: all clients who declared their employment history = 1597

Table 3 below shows the relationship between the topics discussed during the review and the person's employment history. It shows some interesting patterns, for example, clients appear to be more likely to talk about gaining employment as their employment history becomes more patchy; those in continuous employment were less likely to discuss volunteering; clients were far less likely to talk about career development, retirement, finances or self-employment if long-term unemployed; those who were frequently unemployed were most likely to talk about health, relationships and caring responsibilities. Further research would be warranted in this area as wider life conditions and experiences are, as we might expect, highly influential but we are not able to correlate outcomes and history within this study.

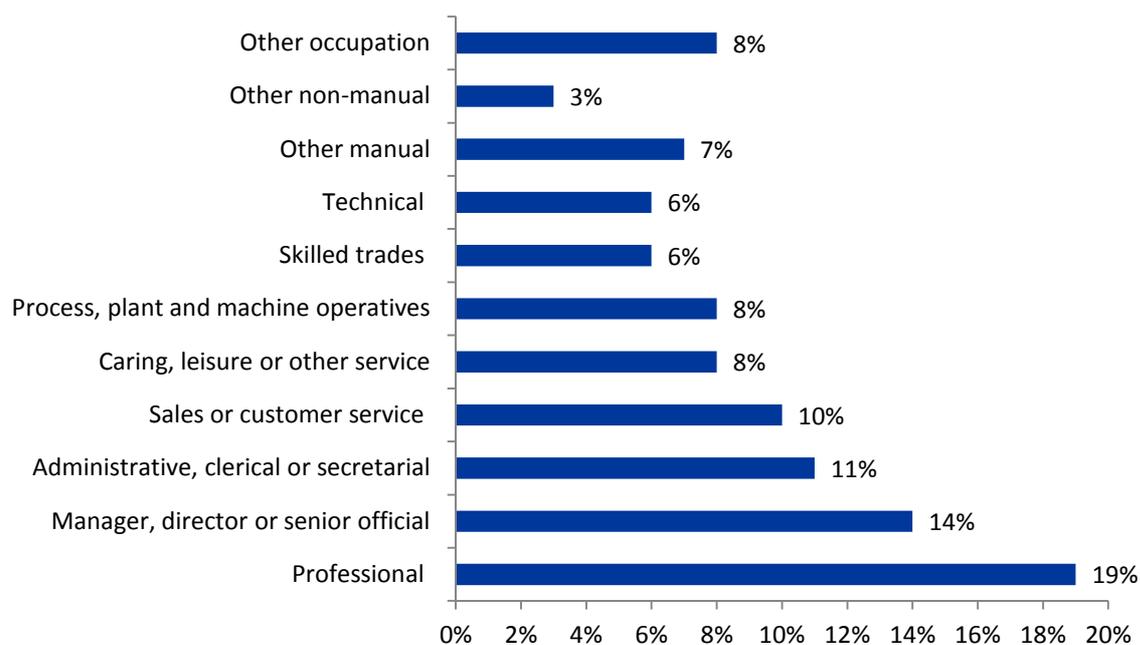
Table 3: Topics covered in review by employment history (%)

Next steps	Continuous employment	A few spells of unemployment	Frequently unemployed	Long-term unemployed
Gaining employment	76	81	83	90
Career development	69	64	51	32
Training/ learning opportunities	63	64	58	54
Self-employment	33	35	33	12
Volunteering	33	40	38	39
Retirement options	24	20	24	9
Finances	24	21	30	14
Health	17	18	25	20
Caring responsibilities	13	10	20	12
Relationships	10	9	18	8
Housing	4	5	8	4

Base: all clients who declared their employment history = 1597

Figure 9 below shows clients' occupation levels. Over a quarter of clients were in professional, managerial, director or senior official positions, the groups currently most likely to continue in paid work after State Pension Age.

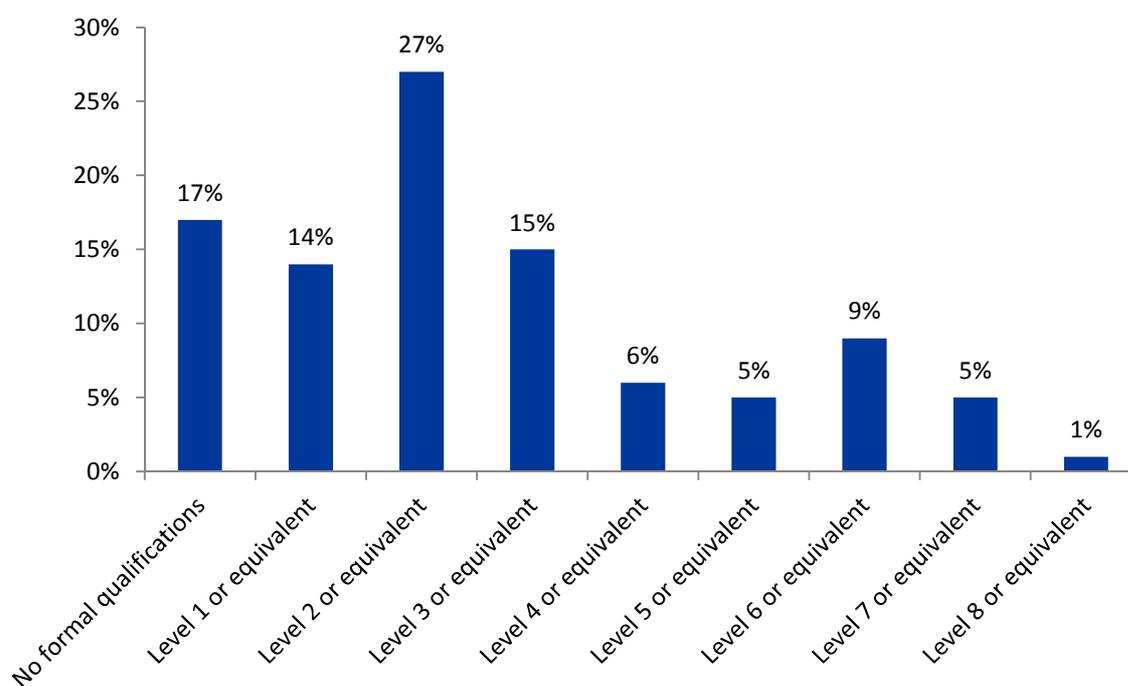
Figure 9: Clients' occupation levels



Base: all employed or self-employed clients = 475

Figure 10 below shows clients' highest qualification level. Clients were most likely to be qualified to Level 2 or equivalent. However, almost a fifth of clients had no formal qualifications. This is exactly the same proportion seen at face-to-face National Careers Service customers as a whole (17 per cent)¹³.

Figure 10: Clients' highest qualification level



Base: all clients who declared their highest qualification level = 1657

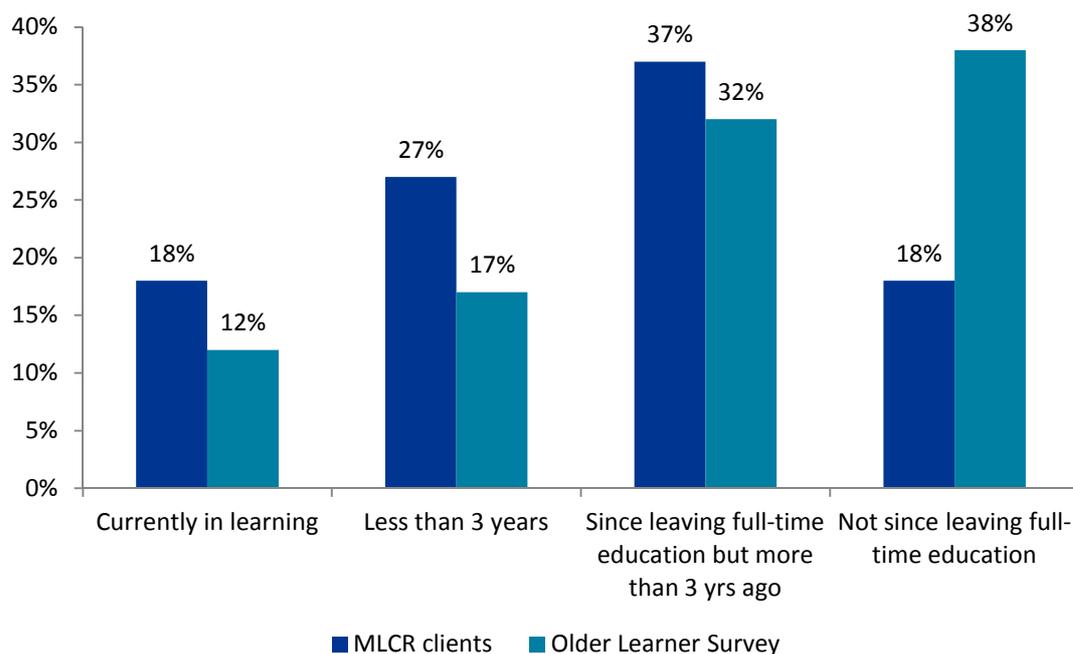
Clients who had acquired a formal qualification were asked when they achieved this. Two thirds (66%) of clients acquired their highest qualification more than 10 years ago. One fifth (20%) had achieved the qualification in the last 5 years. However, only 18 per cent of clients had not engaged in education or training since leaving full-time education. In fact, a fifth of clients identified themselves as being in learning at the time of their engagement with the project, which is significantly lower than the proportion of this age group who are current learners¹⁴. In the case of the Mary Ward Centre all the clients were learning at the time of the project. Figure 11 below compares the time since MLCR clients last engaged in education or training with respondents to NIACE's survey of older people's learning¹⁵. Although these figures are not directly comparable, as the sample of the older people's learning survey were aged between 50 and 64, the data suggest that MLCR clients were more likely to be current or recent learners than the age group as a whole.

13 BIS (2013) National Careers Service: Satisfaction and Progression Surveys: Annual Report (April 2012-March 2013 fieldwork). London: BIS.

14 Aldridge (2014) op cit.

15 McNair, S. (2012) Older People's Learning in 2012: A survey. Leicester: NIACE.

Figure 11: Time since clients last engaged in education or training

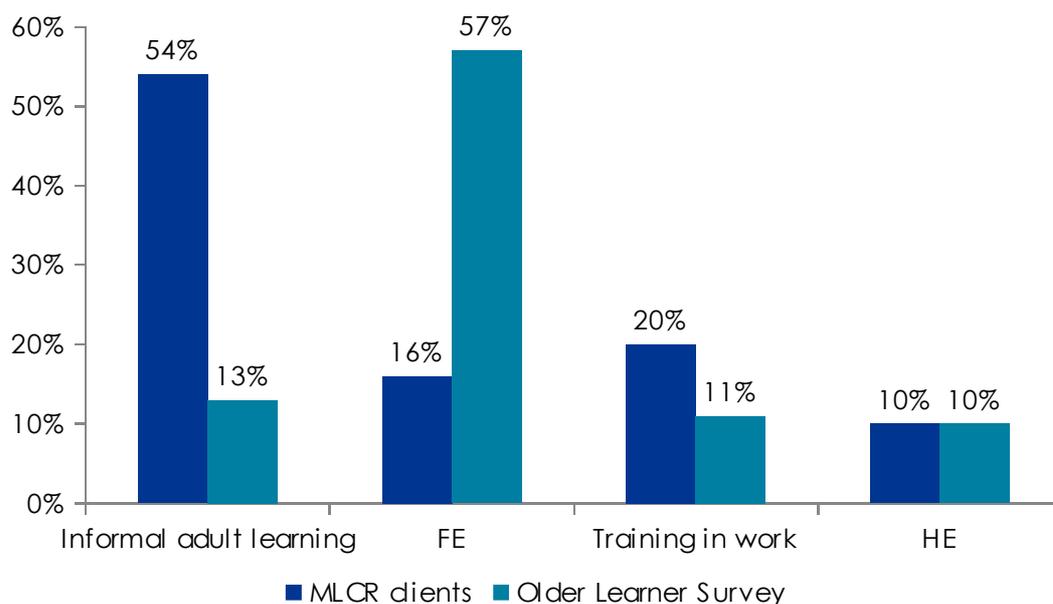


Base: all clients who declared time since they last engaged in learning = 1257

Figure 12 below shows the type of learning clients were involved in. Over half of clients were engaged in informal adult learning at the time of their review. In comparison with the respondents to NIACE's survey of older people's learning¹⁶, MLCR clients were far more likely to be engaged in informal adult learning but far less likely to be engaged in FE. This high proportion of informal learners may be the result of the current Skills Conditionality policy, whereby unemployed people who have an identified skills gap can be referred to learning provision, as fifty-seven per cent of the clients in informal adult education were unemployed. One project partner specifically targeted mid-life learners completing community learning programmes.

¹⁶ McNair, S. (2012) Older People's Learning in 2012: A survey. Leicester: NIACE.

Figure 12: Types of learning undertaken



Base: all clients in learning at the time of their MLCR = 304

Impact: what difference did it make for the clients?

The MLCR project engaged a diverse range of clients. Not surprisingly, due to the profile of clients, the variety of topics covered in reviews and the range of delivery approaches, the impacts for clients varied across and within pilot sites. In September 2014, approximately one year after the start of the delivery of the Mid-life Career Review (MLCR) project, NIACE carried out a follow-up survey with MLCR clients. The aim of the survey was to find out what impact the MLCR project had had on clients. For reasons beyond the project's control, the response rates were low. However, the profile of respondents matched closely the client population and can be taken as broadly indicative¹⁷.

Responses to the adviser survey indicated a wide-range of positive impacts for clients. The majority of advisers highlighted positive outcomes for clients including:

- improved confidence or motivation to explore options and make changes;
- uptake of training, learning and volunteering opportunities;
- started searching and applying for jobs;
- accessed further IAG; and,
- signed up for training/ learning programmes.

¹⁷ For reasons of confidentiality, follow up contact had to be made through the MLCR providers. However, at the time of follow up, National Careers Service partner staff time was constrained by the work involved in bidding to renew their contracts. Furthermore, computer systems were also being replaced, making access to records more difficult.

Around a third also stated that they had seen the further positive outcomes, for example clients had been offered an interview for a job, had explored options for self-employment or started volunteering.

Less commonly reported, but nonetheless positive, outcomes recorded by some included that some clients had made changes to improve their health, gained employment, sought financial advice, requested a change in working hours/ ways of working and/or changed career. Some clients had become self-employed. Other clients had entered phased retirement or retired fully.

Access to support

It was important for clients to be able to access further support including from, for example, specialist careers advisers and other specialists in finance and health. In addition clients sought advice and support informally from union learning reps and workplace learning advocates. Peer support, including through group sessions/workshops was particularly welcomed by many clients.

'Networking... other members of the group signposted her to support organisations. There's a voluntary organisation that she is going to now.'

Adviser

As intended it was important that support could be offered on a wide-range of topics, and included information and signposting to a plethora of other services. This reflects the whole-life approach taken by the project.

Clients also felt supported by having had space for self-reflection.

'Customers have been able to actually take the time out, sit down and psycho-analyse themselves and come up with some very positive ways forward.' Project Manager

'They seemed to be really pleased that they had been given an ear, from somebody that can sign-post and has got information and knows where to find it.' Client

Clients also were helped to identify steps forward, to develop CVs, becoming more aware of the range of support available and options open to them.

'As you get older, if you've not been in the job market for a while you do doubt your abilities. What you need somebody to do is to say 'yes you are good at this, you're excellent at that, you've got considerable skills in this area of work. And that's what I needed very much and that's what we identified in the meeting.' Client

'Just having the opportunity to talk to somebody, I think that's been the biggest difference... Knowing that there is somebody you can talk to who at least will listen and who might be able to help you or point you in the direction.' Client

'At first I didn't have a picture or a plan but now I've got a clearer picture of the sorts of things I should be doing... and just talking about it to be honest with you, just spending time talking to people about it, that was useful.' Client

Confidence, self-esteem and well-being

The most frequently reported impact on clients was an increase in confidence as a result of identifying their skills and how to transfer them, finding out that they have options, meeting people, learning new things, identifying reasons for their lack of self-confidence, challenging stereotypes and concerns. Advisers believed that the offer of support itself had helped them to feel valued and important.

Comments from clients and advisers included:

'Good confidence booster.' Client

'That they're not on the scrap heap. There are things they can still develop.'
Project Manager

'I think it's given them a focus, given them heart. Not feeling over the hill... different route ways.' Project Manager

'I think they felt that somebody believed in them.' Adviser

'It got me out of the house. It got me meeting people.' Client

'It seemed to boost their confidence. They weren't hung out to dry.' Adviser

'Becoming aware of why I did feel under confident. And maybe identifying that I did feel under confident because until you become aware of that you can't actually do anything about it.' Client

'It gave me the confidence to apply for a job... without the session I wouldn't have seen the advert for one thing, but being able to sell my skills and promote myself in the way that I did do I possibly wouldn't have been able to do without that session. Because as I say, identifying confidence issues was a major thing for me.' Client

This confidence boost was believed to help clients in challenging discrimination, or their perceptions of discrimination, and in developing a positive approach to employers.

'I think a lot of the time it's... given them the confidence in their own skills and abilities rather than them thinking that employers would prefer younger workers.' Adviser

'When I fed back to the employer what some of the ideas and suggestions were and the employers taking on some of these. So I think some of the older workers felt quite valued. That their experience was of value to the organisation.' Adviser

'It obviously made them stop and realise that actually although they may have a few more years on the clock, actually what they've gained is a huge amount. I think there is that light that comes on, that actually just because you are a bit older that is a good thing not a bad thing. So that was a really positive thing.' Project Manager

Older workers sometimes feel unsupported and that their concerns are not relevant, but the review and feedback could change this perception.

'It's made them feel they are cared about and they've been supported. It provides motivation, a bit more confidence.' Adviser

'It doesn't matter what level of profession or experience or promotional opportunities you had in the past, when you have been made redundant and gone through time and again getting rejected, I think it affects everybody.' Project Manager

'They feel that they are valued because we are taking an interest in them.' Project Manager

'The fact that they have felt listened to.' Project Manager

Feedback from offenders in custody who took part in both group and one to one review sessions was very positive. The focus of their MLCR was in helping them to prepare for leaving prison, as the majority was made up of 'lifers' who were close to release. Finding out about employment, benefits, housing, sources of support, learning, volunteering was very important to them. They had a folder of information, provided by the guidance provider and developed for the project, to take away and digest. A focus group was held with the offender clients who reported that they had learnt a lot from the adviser and each other when the delivery was in a group. This supported their increased motivation, sense of direction and had helped to give them a more positive outlook. The advisers interviewed also reported positive findings, particularly from the group work sessions with this client group.

'The main benefit I think they all came away to believe... even though they're more mature, there could be something out there for them... there are options they could look at... they are not a lost cause. There is a lot of positives out there.' Adviser

Offender clients reported that they had increased knowledge and far more up-to-date information. Some clients said that they were now in better place to benefit from the standard support from the National Careers Service, before and on release, as they had more awareness of what it could offer. Normally they are not introduced to the National Careers Service provision or what they can expect from it in any way. The support they received from the MLCR pilot process was additional to any intervention that they would otherwise have experienced. The offenders also found out more than they had done previously about what they could access in

custody to support their transition into life outside and their future. It was felt by the clients that the group work helped them to prepare for a work environment, including helping them to work better with others through enabling them to identify and accept or understand other viewpoints.

Motivation and planning

Client feedback further suggested that they had learnt a lot from the adviser and also each other when the delivery was in a group, and that this supported their increased motivation and sense of direction.

'He was really de-motivated and I could see the change in him after he had the midlife review in terms of actually starting to do things for himself which he hadn't been doing.' Adviser

Other benefits of MLCR

These aspects were particularly important for people who have either been in the same job for a long time or have been longer-term unemployed.

'Opening more doors for themselves... going through the programme they might think I could go in to a different field of work.' Project Manager

'Another client had worked as a nurse for number of years and she's always wanted to get in to legal services. She said 'I don't know if I would have explored this'. At stage of looking at courses. That is quite a change isn't it? And seeing it as a possibility.' Adviser

'It put me on some kind of path on which I could actually go down and use to move myself forward.' Client

'I think it's actually worked well for people who are in employment and are at that crossroads, maybe not necessarily under threat of redundancy themselves but may have been in an organisation where they have been and they've had to accept lower status jobs. Before they're thinking 'well this is it for me because I'm 55 now, I've had a reduction in my job and I'm not going to get promotion again'. I think again it's given them the impetus to question that.' Adviser

'It got people thinking I think, to realise what they'd got, and actually what they could do, and what they had got behind them and also to help plan what they needed to do to take those forward.' Project Manager

Learning

Here we explore the extent to which learning and training was part of the review session, and if it was, was it the adviser or client that introduced this topic.

From the data, and also the list of resources that providers used, we can assert that all providers included learning and training in their MLCR 'offer'. In some cases it was more explicit than others but it was clear that for National Careers Service prime

contractors, learning and training was part of what already provide to clients, and the other pilot providers all had a learning focus. The extent to which it was a focus linked to expressed client need.

A key area of interest in MLCRs from the advisers' point of view was in learning or training. This topic was not necessarily raised by clients unless prompted by advisers.

'It opened up learning doors to adults... it helped increase confidence and often self-esteem. It motivated clients and it made people stop, reflect and most importantly act. They said to me they would be going away and checking things... It certainly encouraged people back in to education and adult education and that's the biggest benefit.' Project Manager

'I think it's awareness really. Being with the same employer for such a long time and being aware of the opportunities, re-training.' Adviser

As the providers were taking a holistic approach, this included learning and training. Some pilots surveyed potential clients about their needs and interests (including learning and training) and based their offer on the feedback they gained. The providers used the review to raise awareness of local learning opportunities and providers and, by identifying existing skills and skills gaps with clients this encouraged them to point towards relevant providers. Review sessions of all kinds, including workshops, supported clients to recognise their skills, identify skills gaps, and work towards develop their skills.

Listed below are brief examples of learning and training included in each pilot:

- **Babcock** – The MLCR workshop included completion of the personal competency profile – identifying existing skills and knowledge, and gaps to address. The workshop also included tips for managing change – including new skills like IT; and clients were given details of local learning providers – college, university and voluntary sector providers
- **BSS** – The approach was to have open conversations with people and as part of this to support clients to identify and address any barriers/ issues they faced which could include training matters e.g. lack of IT skills; and, signposting to places with learning information.
- **Careers South West** – Provided clients with a range of resources on a USB. They also ran workshops which focused on supporting people to identify and develop their skills to help them into employment and worked with a group of NHS workers, part of which was getting people to think about change and what may be the implications of change. MLCR helped highlight client skills needs e.g. networking, interviewing skills.
- **Careers YH** – Provided more in-depth support around CVs. Through group work, concerns were raised about IT skills and most clients needed help job search skills.
- **CfBT** – The focus was on identifying barriers and helping clients to overcome these – learning was part of this as they took a holistic approach. They introduced clients to lifelong learning accounts and completed skills action plan

- where I am now, where do I want to be, how do I get there and provided links to further information about learning.

- **CSWP** –Skills Check. Information on interview skills. Provided clients with useful links.
- **CLCs** –Work embedded into their CLC role. They developed taster sessions based on feedback from clients. They also used taster sessions to engage learners into MLCR conversations. Supported people to build up their confidence to access learning. Provided holistic support – so not limited to learning.
- **Futures** – One of their MLCR activities was a focus group with learners with learning difficulties and disabilities – this focused on exploring if existing learning provision is meeting their needs. Discussions about barriers/ issues faced by older workers and how to overcome them and supporting people to think about change
- **GMCP** – The approach was to get a 'whole picture' of their life. Action plan included questions about learning. Adviser encouraged them to think about learning and said that learning was the biggest benefit for clients –helped dispel some perceptions e.g. 'too old to study'. Raised awareness about training opportunities and qualifications needed for local labour market opportunities. Signposted to providers as appropriate. Through MLCR, ran interview techniques workshop and educating people on job market and applying for jobs.
- **Manchester Solutions** – Focused on getting deeper understanding of issues clients face and putting together stronger and more focused action plans. Holistic approach– reviewing aspirations and learning needs arising from these issues. Helped some clients improve their IT skills. Links to support on range of issues. Aim of workshop – gain focus and direction for future career planning and develop career management skills.
- **Mary Ward** – Holistic approach – developed workshops to address skills gaps e.g. 'how to sell yourself but not your soul'; practical hints and tips on how to develop skills they're missing; action plans; refer to National Careers Service for more help
- **Prospects** – Holistic approach. Workshop objectives included: complete questionnaire that helps you to reflect on your current approaches to learning, identify your transferable skills and how to demonstrate them; completed an action plan based on your personal career goals
- **Realise Futures** - Skills health check
- **Tribal** – Clients receive folder of resources include signposting to learning information and organisations that offer advice on learning and work. Workshop activity for people to think about their skills and their skills gaps. Action planning/ development plan – setting goals and how to achieve them.
- **Unionlearn** – MLCR worked particularly well under the umbrella of 'celebration of learning' events – engaging people through informal adult learning. Used questionnaire to identify needs (e.g. first aid course) and then developed activities in response. Card activities around skills and skills gaps, and developing individual learning plans linked to this.
- **WLAs** – Developed pre-review questionnaire to identify people's needs and activities based on this information. A number of other pilots used the WLA questionnaire which listed 'develop new skills for work' and develop new skills for

leisure' as options. Shared useful resources and factsheets e.g. Age Concern – Work and Learning

- **Works for Us** – Clients made aware of support available, including other Works for Us programmes

Paid and unpaid employment

Since employment was a key objective for National Careers Service advisers, who are used to focusing on this area, it was not surprising that work, both paid and unpaid, tended to be the main focus of the MLCR, especially for advisers supporting unemployed clients. This was not the intention of a holistic review, but it was clear that a minority of advisers found it more challenging than others to adapt their style and broaden their approach.

'You can always guarantee that someone in the group will mention volunteering and you might get some negative responses but you can talk through that... being able to challenge those perceptions.' Adviser

'One particular company that I worked with, as a result of the discussions with the older workers we set up a succession planning group. Older people are doing more training and development of new people coming through.' Adviser

'I think it was because they were able to maintain older workers. The company I talked about... the older workers are doing physically active jobs and in one or two cases they were thinking they were coming towards the end of their working life. But following the discussion the employer starting using them more as trainers. Keeping their expertise and enabling younger people to come through and learn the work from them.' Adviser

'Everyone who took part got an up-to-date CV and also got follow up support at local careers office, told them what free training was available.' Adviser

Table 4 illustrates the outcomes which advisers identified as having been achieved by their clients. Some clients were able to achieve more than one outcome, therefore the figures reflect the frequency of outcomes mentioned.

Table 4: Positive outcomes for clients in taking part in a mid-life MLCR

Outcomes	Frequency
Improved confidence or motivation to explore options and make changes	33
Looked for training/learning opportunities	30
Looked for volunteering opportunities	27
Started searching/applying for jobs	27
Accessed further IAG, e.g. with National Careers Service	26
Signed up for training/learning programmes	21
Been offered opportunity to interview for a job	15
Explored options for self-employment	15
Started volunteering	14
Made changes to improve their health	13
Gained employment	11
Sought financial advice	11
Requested a change in working hours/ways of working	10
Changed career	10
Became self-employed	5
Entered phased retirement	5
Retired fully	1
Other, please specify	2
Not aware of any positive outcomes for clients	4

Base: all advisers who responded to the online survey = 41

Note: respondents could select more than one response

Table 5 shows the progression pathways for the clients as revealed by the client data provided by the partners. It should be noted that take-up of a face to face session does not imply that the client had not already had one of these. In some cases, for example, clients took up the offer of multiple one to one sessions so it is not possible to correlate the data between the different types of provision already undertaken and the progression route. In addition, clients intended to take further steps on their own; these could include referrals to other agencies and working further through the materials supplied by the providers. Most clients would undertake more than one activity and these are detailed in Table 6.

Table 5: Next steps with adviser/pilot organisation

Next steps	%
A face-to-face, one-to-one session	52
Ongoing contact with adviser	17
Pilot organisation's website	14
A telephone session	13
A group session	9
Other	3

Base: all sessions (excluding those delivered by Unionlearn) = 2405

Table 6: Next steps to take independently

Next steps	%
Work through hard copy materials provided by adviser	46
Work through online materials provided by adviser	42
Explore opportunities to learn/train	36
Explore volunteering options	15
Explore flexible working options	8
Explore retirement options	5
Other	8

Base: all sessions (excluding those delivered by Unionlearn) = 2405

We were interested to explore whether there was a link between delivery mode of the first session experienced and the likely next steps. It shows that clients were most likely to be signposted onto the same type of session they had already had (for example, those who had had a one to one were most likely to be signposted to another one to one; those who had a group session were most likely to be signposted onto another group session etc.). Those who had a telephone session were most likely to not be signposted onto any further provision. The detail is shown in Table 7 below.

Table 7: Delivery mode of first session by progression pathway (%)

Next steps	One-to-one	Group	Telephone
A face-to-face, one-to-one session	42	33	15
Ongoing contact with adviser	13	14	5
Pilot organisation's website	8	19	3
A telephone session	14	11	35
A group session	5	11	2
Other	4	1	6
None	13	10	33

Base: all sessions (excluding those delivered by Unionlearn) = 2405

This indicates that in the future MLCR providers should perhaps offer further adviser training to make sure that there is no automatic referral and the need to encourage clients to try something different is embedded into the review.

Impact for Clients: Follow-up Survey Findings

In general, the respondents to the survey were representative of the population of MLCR clients. The only identifiable difference was their gender: 55 per cent of respondents, but only 47 per cent of clients overall, were women. Further findings from the follow-up survey can be found in Appendix F.

Work related outcomes

The majority of respondents (81%) identified multiple positive outcomes from the Review. The most often cited are relatively “soft” qualities, with over half (51%) reporting that they felt more confident in their own skills and experience, and more than 40 per cent saying that they knew more about possible work or career opportunities. There is no direct parallel for these outcomes in the National Careers Service Performance Indicators. The nearest is “personal added value” (personal skills like IT or team working; improved self-confidence; job satisfaction or a higher level qualification), which is reported by 90 per cent of National Careers Service clients.

There is a more direct parallel between MLCR and the other two National Careers Service indicators. “Employment Progression” was reported by 40 per cent of MLCR respondents, compared to 50 per cent of all National Careers Service clients (though only 46 per cent of their telephone clients)¹⁸. “Learning Progression” was reported by 65 per cent both of MLCR respondents and National Careers Service clients¹⁹. It shows that the work related outcomes for Mid Life Career Review are similar to those for National Careers Service clients.

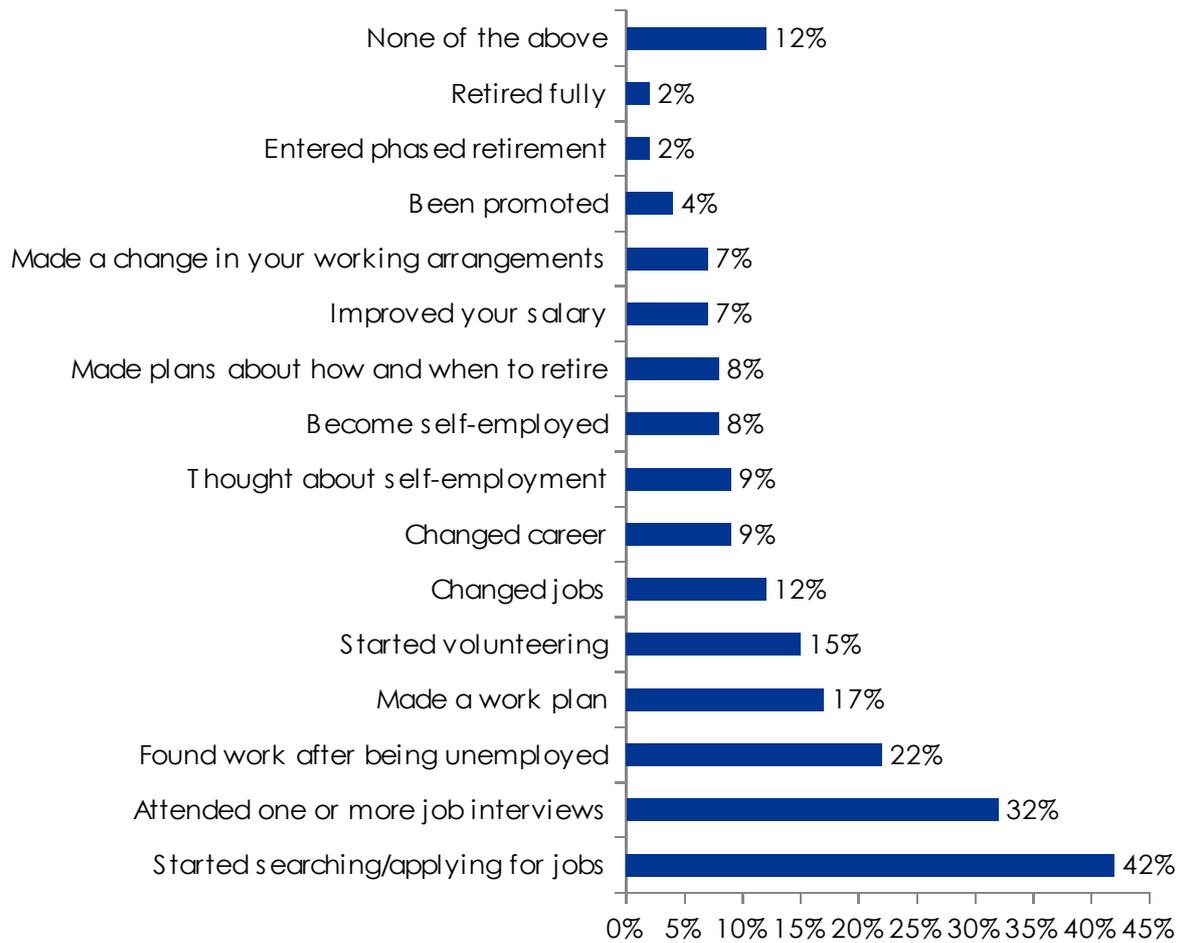
As Figure 13 below shows, 88 per cent of respondents had taken some form of action related to work or retirement since taking part in the MLCR project. Over 20 per cent of clients had found work after being unemployed, while around 40 per cent had started searching or applying for jobs and almost a third had attended one or more job interviews. These figures are lower than for National Careers Service sessions in general, where 50 per cent of clients achieve employment progression. However, such employment progression figures are more likely among young clients, those with higher qualifications and of non-white ethnicity, who represent a smaller proportion of the MLCR age group.

Respondents who indicated that they had taken action were asked to specify to what extent these were a result of their MLCR. As Figure 14 below shows, 82 per cent of respondents felt that their MLCR had contributed to them taking these actions. This compares favourably with the National Careers Service data, which shows the adviser’s contribution to each of the three Key Performance Indicators (KPI). For those reporting each KPI, the proportions reporting that the Adviser had contributed were: 74 per cent for “personal value added”, 63 per cent for learning, and 57 per cent for employment-related outcomes.

18 Department for Business Innovation & Skills (2014) *National Careers Service Satisfaction and Progression Surveys: Annual Report (April 2013-March 2014 fieldwork)*

19 Ibid

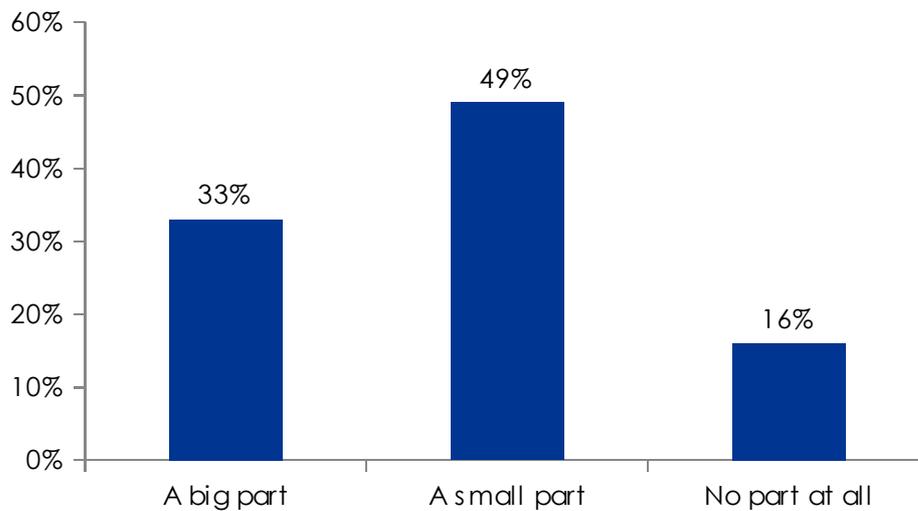
Figure 13: Actions respondents had taken since their MLCR



Base: all respondents = 161

Note: respondents could select more than one answer

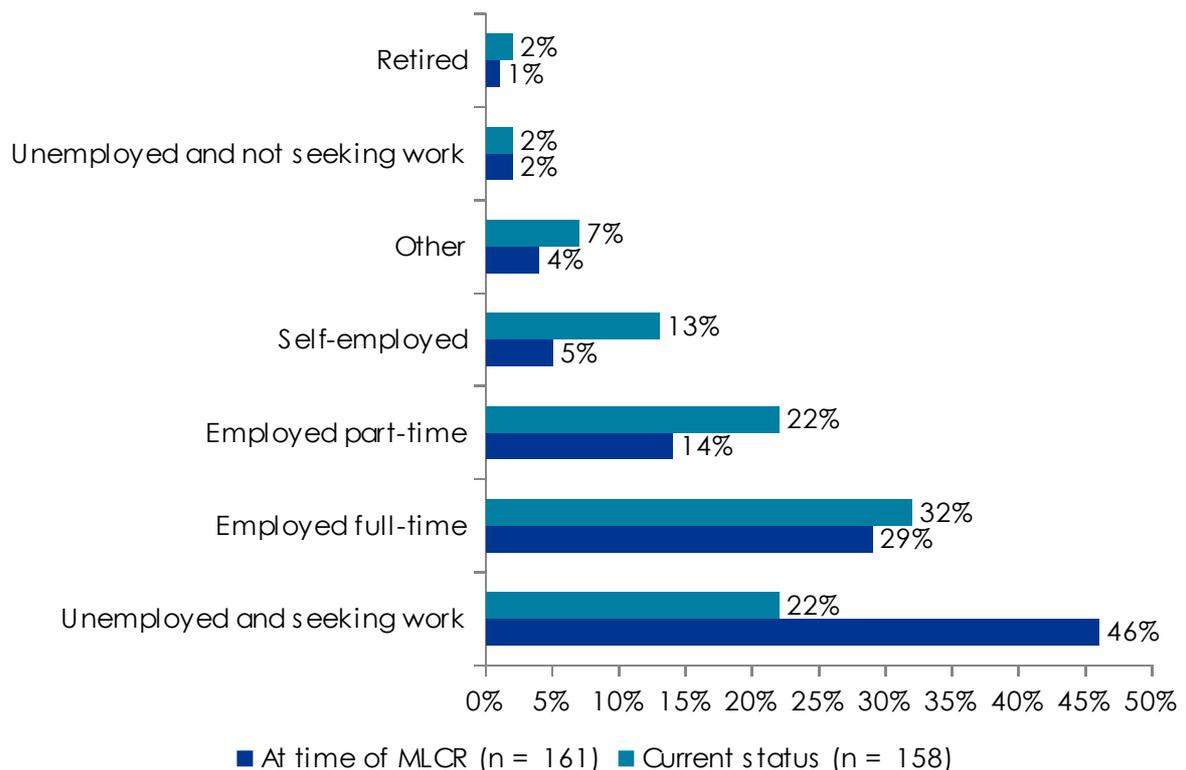
Figure 14: Extent to which actions were a result of MLCR



Base: all respondents who had taken actions since their MLCR = 140

Half of those respondents who were unemployed and seeking work at the time of their Review were in work at the time of follow up approximately 12 months later (Figure 15 below). Data from Nomis²⁰ shows that 70 per cent of Jobseekers Allowance claimants aged over 50 years old are not claimants after six months and 85 per cent are not claimants after 12 months. However, these figures are not directly comparable with the MLCR survey. DWP survey evidence shows that only two thirds of JSA claimants leave to enter employment. MLCR respondents were more likely to have found part-time work or self-employment than full time jobs.

Figure 15: Employment status at the time of MLCR and at time of survey



Base: all respondents who gave their employment status = 158

Learning related outcomes of the Review

Respondents were given the following definition of learning²¹, and were then asked whether they considered themselves to be in learning.

‘Learning includes both formal and informal courses, e.g. work-based training, an accredited course, or learning related to a personal interest or leisure activity. It can also include learning you’re doing on your own, e.g. from a book or online.’

The proportion of respondents who were learning rose between the Review and the follow up, from forty one to forty five percent. This is higher than the 30 per cent of

²⁰ Nomis Labour Market Statistics, ONS. <https://www.nomisweb.co.uk/>

²¹ This is the definition used in the NIACE annual survey of adult learning.

people aged 45-65 who report some form of learning in the NIACE Adult Learner Survey, but substantially lower than the 65 per cent of National Careers Service clients who report progression in learning following their interaction with the service. Almost half of these clients had started learning for a new job or to change jobs, while over a third had taken up learning for their present job. Over four-fifths of these respondents felt that their MLCR contributed to their decision to take up learning.

Whilst the MLCR follow-up survey experienced a low response, the findings are indicative of the outcomes achieved and are supported by the qualitative research findings.

MLCR advisers

It was of vital importance to involve advisers and other key stakeholders (e.g. employers) in developing the MLCR offer. Advisers and pilot providers also needed support with planning and preparation. Some pilots organised specific training sessions for the advisers who were going to take part and some also encouraged pilot advisers to participate in a MLCR themselves before doing it with others.

'They [advisers] are so set in their ways about how long they've got to work with people.' Project manager

'The preparation is important, the session written and clearly understood, and all the coaches being involved. And understanding your market.' Project manager

Some pilot providers gave advisers extra support on specialist MLCR issues, such as signposting to financial, caring and health support, to deal with significant career change aspirations and improved knowledge of the local labour market.

'It pushed me to research information for the mature individual, finding out what is out there, what is available. I also did a lot of research into self-employment. It's extended my knowledge in those areas.' Adviser

'Finding the right issues that are going to press employer's buttons.' Project manager

Advisers tended to be involved in the marketing and promotion of the MLCR pilots and therefore needed to be able to 'sell' the offer to clients, both in advance of and at the start of the session. Therefore they needed to be very clear themselves about the process and what it could offer. This became part of the adviser training.

'It's that anxiety of what am I going to be asked. Maybe that is something we can learn from this. If we are running groups [again] perhaps we need to give people a bit of information upfront... so there is not that concern about... a question I may not be comfortable to answer.' Adviser

Delivering the MLCR sessions:

Advisers highlighted that they were able to offer good support to clients when they had the opportunity to work with them for longer than usual:

'It's very good for me as an adviser to be able to spend real quality time interviewing someone for between 90 minutes and 2 hours. I can go in to real depth with people and because I've gone in to depth with them they've found that of value.' Adviser

The importance of excellent guidance or career education skills was highlighted specifically.

'It did blur the lines of counselling really... the content is very personal.' Adviser

'Because of the knowledge and experience he had in careers IAG he was able to give me options that I hadn't thought about before.' Client

'It wasn't just about accepting what people were saying but challenging you and questioning you by probing to get you to deep think.' Client

'The most important thing is having good rapport with somebody, because without that it doesn't matter how technically competent you are, they will not disclose and share what they're really concerned about.' Client

'It enabled us as careers advisers to actually do careers work... this was enabling us to do more quality careers guidance and helping people to consider different options.' Adviser

'The two members of staff that work with me are fairly newly qualified careers advisers. And it's enabled them to practise their skills rather than just come out and go straight in to advice work about CVs.' Project Manager

'It's far more in-depth work that you're doing.' Adviser

Some advisers "were scared that even talking about pensions would constitute financial advice" (project manager). This again needed training in signposting and referral and an understanding of the issues affecting the mid-life client group.

It was important for advisers to have the opportunity for on-going reflection, monitoring and evaluation of the process. Regular adviser meetings supported this in some pilot providers, alongside further seminars and Continuing Professional Development (CPD) where needed. The value of this adviser peer support in terms of sharing best practice was noted:

'We, as a team, network with each other. So there's always the peer to peer support.' Adviser

Advisers had to be able to cope with a range of clients and their vastly different issues; taking a flexible approach and being prepared for perhaps a higher level of

disclosure than might usually be the case. A number of examples are outlined below.

Throughout the pilot, Workplace Learning Advocates were able to access one-to-one support from The Johnston Partnership and Work based Training (who lead the WLA initiative) to establish and deliver MLCR activities in their workplaces. Support was provided in person (at their workplace), and by telephone and email. Peer support was also encouraged via email, LinkedIn and WLA network meetings. WLAs were provided with a range of materials to support them with their activities: for example, a questionnaire to use with employees to identify their need and interests. They also received support to access useful resources for clients and establish links with local organisations to engage and signpost clients on to. This support was critical for WLAs who undertake the role in a voluntary capacity and have limited time and resources.

'A lot of the people who have done it have said they needed a mentor to get it happening... we've done this on a one-to-one basis and gone in to meet them.' Project Manager

'It wasn't overpowering. They didn't bombard you with information that they probably knew you wouldn't have time to get through but a simple phone call to ask how things were going, regular emails. Always 'if I can help, give me a call'. The support was excellent.' Client

The Mary Ward Centre brought in an experienced careers adviser from a neighbouring college to support the development and delivery of the MLCR project and to mentor a member of staff. This member of staff is now planning to develop her IAG skills and knowledge further through a formal course.

All coaches at Tribal had a 1:1 induction and training with the Project Manager at the start of the pilot, and were in regular contact with the Project Manager and each other throughout the delivery phase. The coaches met together when delivery was underway to share experiences and good practice.

The Project manager of Community Learning Champions (CLCs) put on additional training for CLCs and allowed them to shadow her when she started delivering the sessions herself. As part of the project, the project manager has been developing and updating a signposting resource to support their CLCs' work. This includes lists of local organisations which can provide further information, advice on guidance on a range of issues which may affect those in mid-life, including health, finances and caring responsibilities.

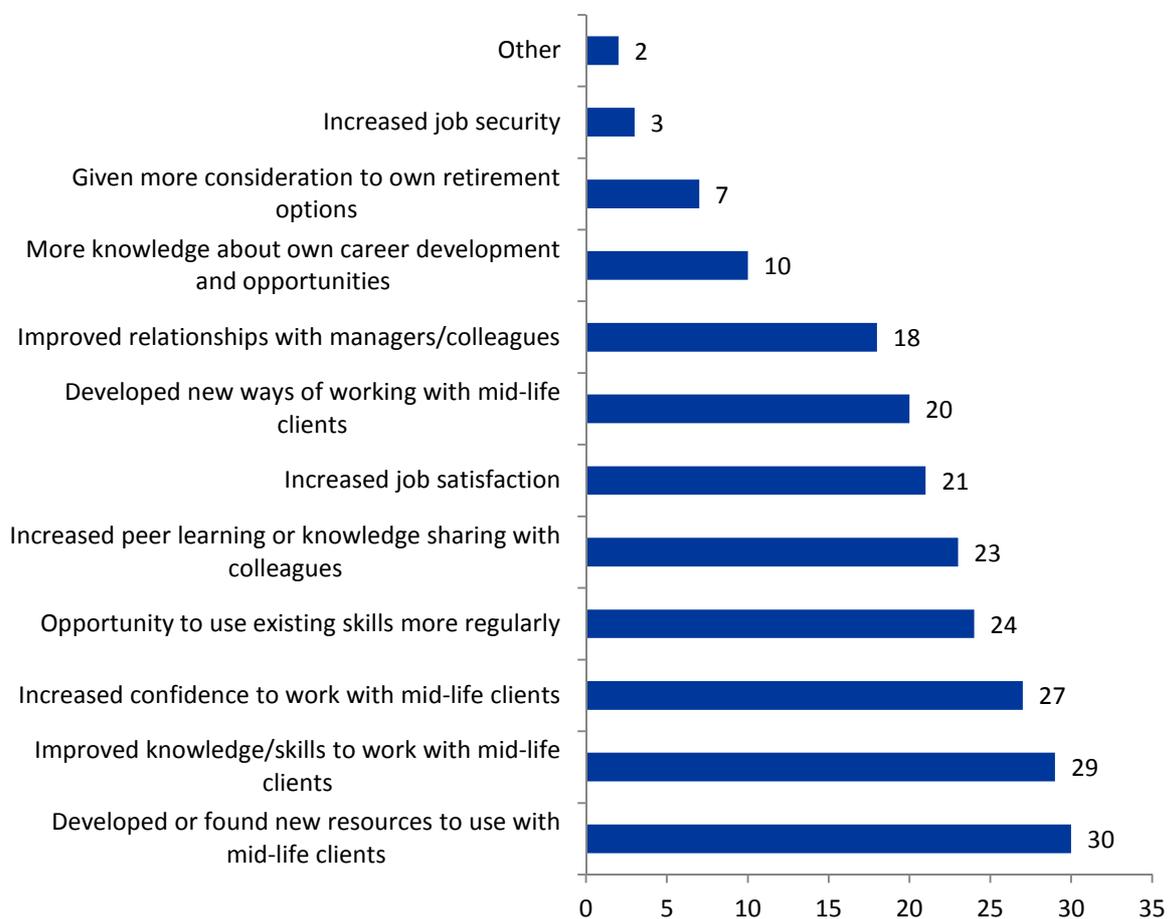
BSS advisers were supported by four quality coaches who have considerable experience of working with the client group and in delivering careers advice in a range of formats.

Detailed information in the Unionlearn evaluation report about the training and support provided to ULRs, which included briefing sessions, support from Unionlearn and union staff, and the provision of information and resources including the development of the Climbing Frame Learning theme.

Impacts for advisers

As Figure 16 below shows, advisers experienced a wide range of positive outcomes as a result of being involved in the MLCR project. In particular, advisers had developed or found new resources to use with mid-life clients, and had improved their knowledge, skills and confidence to work with this age group. Two advisers indicated that they had experienced no positive outcomes as a result of working on the project.

Figure 16: Positive outcomes for advisers on Mid Life Career Review project



Base: respondents to adviser survey who identified positive outcomes for themselves = 39

Note: respondents could select more than one response

Resources

One of the benefits of the project which advisers valued most was the development and sharing of resources relevant to mid-life clients. This enabled advisers to diversify and develop their offer to this age group and provide mid-life clients with a more

comprehensive service. Some of the resources developed can be accessed on line. (See Appendix D for details.)

'I've developed knowledge of different resources that will be of benefit in the future and that we can share with the service. This is not about what I've got but sharing it with others. Some of those resources were out there any way but it's just about highlighting them sometimes.' Adviser

Improved adviser skills

To be successful, advisers had to develop the skills and confidence to deliver review sessions. This included subject knowledge, delivery approach and also a greater understanding of the whole potential client group in this age range. The adviser needed to be able to provide support on a range of issues.

One of the most commonly identified outcomes for advisers was an improvement in their knowledge and skills to work with mid-life clients. This included a more detailed understanding of the issues affecting this age group, developing a more flexible and individualised approach to interviewing clients and gaining new project management skills.

'Without a doubt I've developed my skills in terms of working with customers, my understanding of the age group.' Adviser

'It pushed me to research information for the more mature individual, finding out what is out there, what is available. It's extended my knowledge in those areas.' Adviser

The majority of advisers attributed this outcome to the opportunity to work intensively with one age group and the additional time they had to work with clients. This enabled them to explore mid-life clients' issues in greater detail and reflect on and adapt their practice and approach.

'It's enabled me to use skills, widen my skills. It's also given me access to wider events and a knowledge base that I wouldn't normally have access to.' Adviser

'[Advisers] have appreciated that chance to look at what's going on in a bit more detail, reflect on how they're doing things... they don't get a lot of time to do that.' Project manager

In some pilots, the advisers involved in the project have already met with those who did not deliver mid-life MLCRs to cascade what they have learnt and share best practice in working with this age group. Therefore it was not just the advisers involved in the project who developed their skills but all advisers across these pilot sites.

As well as developing new skills to work with this age group, advisers appreciated having the opportunity to use their existing skills in delivering guidance on this

project. This had not only resulted in a more in-depth review session for clients, but also increased advisers' satisfaction with their service to clients.

'It allowed me to apply knowledge, skills and experience that I have but I don't routinely use on a day to day basis to the level I wish to do as a practitioner.' Adviser

'I think the key thing there is the ability to use skills and apply skills that people don't have the chance to do on a day by day basis... these interventions have allowed people to use more guidance skills.' Adviser

Improved adviser confidence to work with mid-life clients

One reason that partners got involved in the project was to improve their advisers' awareness of and expertise in working with this age group. As advisers developed their understanding of the needs of mid-life clients, they became more confident to deliver sessions to this age group. By the end of the project, some advisers were starting to see themselves as specialists in delivering IAG to mid-life clients.

'They were unsure about how to approach it, but once they started doing it they become a lot more confident, they got their own style of how they were doing as well.' Project manager

'Their confidence has increased and they're starting to see themselves as mid-life specialists, which is what we wanted.' Project manager

Advisers who completed the online survey were asked how confident they felt to work with mid-life clients before and after the project. Around a quarter of advisers said they felt very confident to work with mid-life clients prior to the project; around half were quite confident and a further quarter said they did not feel confident to support this age group. In comparison, all but one of the advisers said they felt quite or very confident to work with mid-life clients after their involvement in the project, with the number saying they felt very confident more than doubling (25 compared to 12). Some of these advisers now saw themselves as specialists within their organisation in this field.

Peer learning

As part of the project, many pilots set up regular networking or best practice meetings between advisers. This enabled them to share their experiences and support the development of each other's knowledge and skills to work with this age group. This enabled some advisers to improve their practice and has resulted in better links between advisers, not only within each pilot but also across regions.

'What this project has enabled them to do is to get together as a group of advisers to share good practice, to look at the things they are doing well, and maybe learn from other advisers about how they can improve their practice.' Project manager

'I met very interesting people. Some very forward thinking ideas and I've been able to think oh I can link this with other people, get in touch with other organisations and other people, to help each other out.' Adviser

Job satisfaction and staff morale

Over a third of the pilot partners commented that their advisers had experienced an improvement in their job satisfaction and staff morale as a result of being involved in the project. Half of the advisers who responded to the adviser survey said that their job satisfaction had increased, and a quarter said that staff morale had improved in their organisation as a result of the project. This was often cited as a consequence of having more time to work with clients; advisers felt that they were delivering a better service and contributing to some significant outcomes for their clients. The project also gave some advisers the opportunity to work with a different group of clients or to get involved in developing their pilot's offer. As a result, advisers found the project refreshing and it has renewed their motivation to deliver IAG.

'Most of our clientele are job seekers, Job Centre Plus clients, a decent percentage of them on these courses²² that weren't necessarily from that channel and advisers said that was quite nice and refreshing to see some different people on that.' Project manager

'One adviser found being a part of the MLCR very beneficial, where it was more in-depth and could really get a sense of helping someone.' Project manager

Advisers' career progression

The majority of pilot partners selected advisers who were in mid-life themselves to be involved in the project. Consequently, many advisers found that the sessions they delivered as part of the project helped them to consider their own career progression and consider their future aspirations and opportunities.

'I can certainly say from [the advisers'] side they both said they'd gained an awful lot from just being able to look at their own situation. They could look at careers opportunities, developing their CVs. They were both able to explore their own personal development.' Project manager

'Even the staff here have become part of the midlife MLCR because a lot of us are in that age group. Because we've gone through major transformational change ourselves, it's been good for the organisation and the staff in it.' Project manager

The non-National Careers Service pilots found this to be a particularly strong outcome and often carried out MLCRs with their advisers.

²² Some advisers saw the mid-life MLCR process and particularly group sessions or workshops as a 'course', as did some clients. This may suggest an interesting way forward for MLCRs.

'We've found that [ULRs] were very interested in having their own review and haven't really thought about it before. One [project coordinator] did recently for a ULR really opened up new horizons for her, highlighting things she hadn't thought about before in terms of skills, experiences.' Project manager

Consequently, some advisers had refreshed their CVs or were looking at taking up more CPD opportunities. For example, two Workplace Learning Advocates were supported to develop their CVs and started looking for new career opportunities during the project. Similarly, the tutor who supported the delivery of Mary Ward's workshops was looking to take up a formal careers advice course to build on the experience she gained from the project.

Advisers' anxieties

On the whole, advisers were positive about the project and the outcomes they experienced as a result of delivering MLCRs. However, a small number of pilots reported that they had had to provide additional training and support to advisers who had found the experience quite daunting. These advisers tended to be concerned about the wide range of issues which mid-life clients could bring to their session. Partners responded by providing advisers with suitable resources and the details of support organisations they could refer clients on to. In particular, advisers were concerned about inadvertently giving regulated financial advice on pensions and this caused some anxiety. For others, a lack of time to commit to the project left them feeling that they could have done more for their clients and as a result they felt quite frustrated.

'... some of the advisers, a minority, were just unable to cope with anything different. Most of them embraced it and found it a positive experience but some advisers were very scared around the pensions issues, scared of even mentioning the word. I'd say there was a bit of fear of change. But most people embraced it and liked it'' Project manager

'Lack of time to commit to this project left me frustrated that I could have provided more information to the customer.' Adviser

'Lack of knowledge in how to continue in a way that I had confidence would not exacerbate a situation.' Adviser

MLCR providers

Providers and their roles

The MLCR project involved 17 pilot partners. Partners included National Careers Service contractors, learning providers and voluntary organisations, as well as Workplace Learning Advocates (an organisation which supports the people of the same title), Unionlearn and a group of community learning champions.

All the partners bar one engaged with one or more external organisations to support the delivery of the pilots. Partners included JCP, National Careers Service where the

partner was not a National Careers Service contractor, employers, learning providers, voluntary and community organisations and prisons. Partner roles included promotion and client referral, providing a venue for delivery, supporting the delivery of MLCR activities and providing support to clients following their review session.

With the exception of the telephone service, all National Careers Service prime contractors involved Jobcentre Plus in their MLCR activity. JCP staff were a key source of client referrals in most National Careers Service pilots. Some pilots held MLCR sessions at JCP offices.

For JCP, the benefits of the MLCR project included the availability of additional support to their older clients which they could signpost on to. At one pilot site, a JCP adviser attended a MLCR group session and helped to facilitate it. This provided them with a valuable opportunity to start building a relationship with MLCR clients. This pilot site is now exploring ways in which they can continue to offer group sessions for mid-life clients on the JCP local supplier framework. This would particularly focus on confidence building. Another pilot site has already made arrangements to continue the delivery of MLCR sessions at JCP premises beyond the lifetime of the project.

Working with employers

The majority of pilot providers engaged with **local employers** (usually larger employers) in some way. For some pilots, such as Unionlearn and Workplace Learning Advocates, employers were a major player within the project, while not being formal partners. The partners who did not work closely with employers found that, on the whole, they engaged the target number of mid-life clients without working with employers²³. Community Learning Champions felt that their clients were too far from employment for work with employers to be meaningful, and that this may actually have prevented some clients from engaging with the project.

As the Workplace Learning Advocates case study highlights, all the employers who took part in the pilot plan to continue the work some way, for example, further group workshops or individual reviews as part of staff appraisals. Benefits for employers of their staff engaging in MLCR activities included:

- gaining a more detailed understanding of the needs, interests and aspirations of their employees at mid-life;
- become more aware of the demographic profile of workforce;
- reviewing and developing current working practices and policies;
- providing support to staff on different issues, and finding out about free support that can be offered to staff
- making improvements to the working environment;
- identifying priorities for consideration and action;

²³ It is worth noting the potential negative effect of working towards target numbers. There is a tendency to get the target met quickly from the easiest to reach participants, rather than reaching further outwards.

- more confident, motivated, loyal employees who feel valued by organisation;
- evidence to support applications for employer awards

At least five National Careers Service partner providers worked with employers who had not previously engaged with the National Careers Service. Unionlearn and Workplace Learning Advocates also brought the National Careers Service to the attention of other employers, as they arranged National Careers Service sessions in workplaces who had not offered this service to their employees before. As a result of the project these employers found out about the National Careers Service offer, established relationships with key personnel and developed confidence in the National Careers Service's ability to deliver a good service to their employees. For example, one pilot site worked with two large local employers. The adviser explained their MLCR offer to senior management to gain buy-in which outlined the potential benefits of the projects to employers. Consequently, these employers actively encouraged their employees to participate in the MLCR sessions. Similarly, Unionlearn found that employer buy-in was crucial to the success of their project. They presented the MLCR differently to different employers depending on which issues were most important to them (for example, employee health and wellbeing), and explained how the MLCR offer could help them to overcome some of these problems. Some ULRs also framed the MLCR as a CPD opportunity for staff.

'People are much more aware of what National Careers service does and the competencies of the advisors being able to turn their skills to a specific group.' Project Manager

At least three partners found that some employers, including those who were approached but did not participate in the pilot, have requested additional support from the National Careers Service outside the scope of the project. Two pilots agreed to deliver MLCR sessions to employees of large employers after the project had finished. Workplace Learning Advocates found that more employers wanted to be involved in the project than they could deliver to during the pilot phase.

Several managers from the partners reported that employers had benefitted in terms of maintaining older workers, boosting staff morale and increasing the motivation and productivity of their workforce. As a result of the MLCR pilot, one employer is now using the skills of older workers for the training and development of new staff.

'One company that I worked with, as a result of the discussions with the older workers we set up a succession planning group. Older people are doing more training and development of new people coming through... They were able to maintain older workers... In one or two cases they were thinking they were coming towards the end of their working life [because they do physically demanding jobs]. But following the discussion the employer started using them more as trainers.' Adviser

Another pilot found that the employers they worked with reported higher engagement and motivation amongst the staff who had had a MLCR.

'The [employers] we dealt with definitely benefitted... it helped re-engage members of staff who were non-productive and who were 'cruising' and who were saying 'I'm too old to change'... people were motivated to change their behaviour in the workplace.' Project Manager

As the quote below shows, one employer who worked with the Workplace Learning Advocates had changed their working policies to focus on their older workers. They also committed to including a review in their annual employee appraisals.

'It's made us as an organisation look at our working policies regarding older employees because we hadn't really focused on them. In addition we're going to implement the review in the annual appraisal system.' Employer

As would be expected, in the review sessions, partners highlighted local job opportunities to clients and supported clients to progress into employment. Some clients moved into employment and more detailed outcome findings will be reported at the end of the next phase of research. In total the pilot led by Workplace Learning Advocates submitted 5 final reports, one per employer. In the case of the employer quoted above, the following evidence is quoted to illustrate the impact.

What difference did the review make to your plans?

Now more focused on developing an appropriate policy and structure for the promotion of the wellbeing of older workers in the organisation.

What do you think the benefits of the review process will be for your employer?

Developing new structures and policies within the organisation that support the older worker.

Impact on the employer

The workshops and activities that have proved most beneficial to staff are to be rolled out to others; also the organisation will be financing a number of these activities over the coming months. The review has given the organisation the opportunity to re-examine its working policies regarding older employees.

Sustainability of the pilot – Will the company continue to carry out MLCRs?

The company will also be implementing the review on an annual basis as part of its Appraisal.

Other comments

The MLCR project has changed our culture and made us think about our working policies for older employees.

It has been good to have time to focus on the issues and to have a framework.

As a result of the project the company has developed a better relationship with the careers service.

Another of the employers reported that:

'The pilot has also helped us to look at working practices... enabled us to look at rota issues to support staff who have caring responsibilities. It has also helped us to focus on informing staff about pensions and auto enrolment and a spin-off of this has been that a lot of the younger staff (not involved in the pilot) also got involved in the finance briefing and are now thinking about pension provision. The pilot has helped us to put more emphasis on providing access to IT for non-office staff. We have realised that we do a lot of engagement with staff and how important this is and that if you show that you care about staff this will lead to greater productivity/loyalty of staff. As the employer we were able to gain better knowledge of the free support that we could offer our employees. [We] improved analysis of the workforce and their needs, chance to look at working practices (e.g. rosta issues), more focus on pensions, access to IT for staff, more recognition of the employee engagement that we already do and using the evidence from the pilot to go towards other awards. We are considering adding review issues to appraisals. We plan to do some work in the future with the National Careers Service to support staff with career development issues.' Employer

Another setting for this pilot was a business start-up hub. Some examples of the impacts that resulted for the SMEs involved were:

- Improved relationships / understanding between WLA and the tenants;
- Improved relationships between participating tenants, buddying relationships etc., even developing the potential for inter-trading/collaborations;
- Better understanding of some financial aspects of business;
- Improved work-life balance awareness; and
- Useful connections, links and information sources.

Other partnerships

As well as with employers, it was important for providers to work in partnership with a wide range of other providers, agencies and others:

'In terms of working with [leisure centre], it's fostered that relationship and in return for them letting us have the rooms, we are doing some middle managers training and development for them. Partnership working is going really well on this. I think that relationship will carry on now.' Project Manager

Tribal worked with HMP Leyhill to deliver MLCR sessions to male offenders aged 45 and over. The MLCR has supported the prison in its work to help prisoners prepare for their release and re-settlement. Many of those attending the project have progressed to further learning in the prison, delivered by an OLASS provider. Other

prisons have also benefitted from the project as funding has been secured to roll out the project across the region.

The Mary Ward Centre has worked closely with City Lit, also a learning provider, to deliver the MLCR project. An experienced adviser at City Lit delivered the one-to-one sessions and some clients have attended further sessions at City Lit. The project has strengthened the relationship between the two organisations.

Futures ran a focus group with learners with learning difficulties at Portland College. The focus group explored the extent to which current provision meets the needs of learners. The adviser reflected:

'I had a group of people, adults with learning difficulties, who were over 50 in learning programmes. Just to have a look to see if the learning provision that's out there for older people is actually meeting their needs. And I think as they get older their needs do change so I had a focus group which was quite good fun to ask them...what sort of provision was needed.'

Prospects worked closely with Bromley College. The College made referrals to the programme and further joint working is planned, with Prospects agreeing to deliver MLCR sessions with learners at Bromley College after the end of their pilot project.

Signposting / Onward referral

Making people aware of and signposting them on to a range of services has been a core part of MLCR activities. The client monitoring data shows that in more than half of sessions, clients were signposted to the National Careers Service. In more than a third of review sessions, clients had been encouraged to explore opportunities to learn/ train. In more than a quarter of sessions, clients were signposted to a learning provider. In 15% of review sessions, clients were encouraged to explore volunteering options. Some clients were signposted on to a voluntary sector organisation. See Table 8 below.

Table 8: Where clients were signposted

	%
National Careers Service	55
Learning provider	26
Jobcentre Plus (JCP)	14
Voluntary or community organization	13
Employer	9
Community Learning Champion (CLC)	2
Workplace Learning Advocate (WLA)	2
Financial advisor/service	1
Other	10

Base: all sessions (excluding those delivered by Unionlearn) = 2405

Developing the offer

Some pilots carried out consultation exercises with potential clients to help them develop a suitable and relevant offer. The majority of partners said that they

adapted their MLCR sessions according to the needs of their clients, whether these were individual or group sessions. For example, Mary Ward Centre introduced group sessions based on issues arising in one-to-one sessions. Workplace learning advocates all started with the pre-review questionnaires to find out what clients' priorities and needs were. Then they developed a MLCR offer, including workshops on specific topics, based on the findings of the questionnaires.

Raising awareness of and promoting Mid Life Career Review

Raising awareness

Importantly advisers' own awareness needed to be raised first and in some cases advisers went through a MLCR of their own before engaging with clients. No-one of course knew what a MLCR was at the outset as the concept was new.

Branding

The partners all chose different methods for promoting the offer. Some advisers reported that the title of the project may have been off-putting to clients. For example, Community Learning Champions felt that the term "career" would prevent their clients from engaging in the project as they were either too far from the labour market or would only think of themselves as having a "job". They avoided branding their work and instead built the project into their normal offer. Similarly, Tribal took out the word "career" in their offer for offenders as they would not see themselves as having a career.

'Career is a strong word and some people are scared off by that. To some people that means a job for 20, 30 years. Even though that's not necessarily the case.' Adviser

Careers Yorkshire and Humber called their offer 'Taking Stock', while the Mary Ward Centre ran a 'How to sell yourself but not your soul' workshop. Realise Futures found that some of their clients took offence to being thought of as 'middle-aged'. However, Babcock kept the full title of the project in their offer as they felt helped to distinguish the session from their National Careers Service offer and attract potential clients who were keen to learn more about it.

'We found that the participants either didn't turn up or when they did they felt that they were being singled out because of their age... there was a reluctance to share.' Project Manager

The terms "mid-life" and "career" are both contentious, and the project deliberately permitted pilots to sell the service under whatever banner they preferred, in the hope that we would get some feedback on what worked with whom. "Mid-life" is vague, making it harder to sell to people who have not thought about this before ("this doesn't mean me"), but less likely to exclude than a specific age would do ("I am 54, so it's too late for a "review at 50"). Careers professionals have always argued that "career" is about how you manage your whole life – after the mid-20s you can't consider a job in isolation from family, finances, health, housing etc....

However, many/some people still think “career” means a managed progression for “posh” people in a single industry or profession.

Engagement activity

As a basis for engaging clients, the partners identified some of the common factors needed to meet the MLCR needs of mid-life clients in an effective way. These included: a review offer that is clear and attractive to potential clients; confident advisers with the suitable knowledge and experience; effective partnerships to facilitate client referral and progression. It was also important for advisers to have access to sufficient additional resources, which increased in number as the project progressed. Much use was made of the resource list provided on the project website.

Approaches

The approaches used to recruit clients to MLCR activities were numerous. There was some variation across the pilot sites depending on the organisation itself, the target group and the method of delivery. Some pilots used more approaches than others.

Examples:

Babcock briefed their National Careers Service advisers about the project, and also members of staff working with employers, to encourage referrals. They promoted it to Job Centre Plus advisers and also produced a range of publicity material which was circulated to a wide-range of local organisations. Publicity material was also displayed in community venues (e.g. such as garden centres, charity shops and on community notice boards) and circulated at job fair events. Review sessions were held in a range of community venues, for example, a leisure centre.

Works for Us identified a number of established groups to target and attended their group meetings to introduce the project and to speak to interested members on a one-to-one basis. Members could sign up to take part in a more detailed one-to-one session. The MLCR offer was also promoted via local organisations and employers, including advertising in a staff newsletter.

BSS was largely dependent on individuals contacting the National Careers Service telephone service and being referred on to the project by advisers as appropriate. They supplemented this approach by pro-actively contacting former and existing clients which proved very effective.

All National Careers Service pilots briefed their advisers about the project and used their existing links with Job Centre Plus to support referrals. The majority of pilots also approached one or more local employers to aid recruitment of employed clients. For some pilots, such as Workplace Learning Advocates and Union Learning Reps, employers were critical to the engagement of clients.

Across the project, approaches to engaging clients have included:

- Developing and distributing publicity material e.g. to front-line workers, potential clients, key organisations
- Briefing Job Centre Plus staff and other key organisations such as local education providers to support referrals
- Briefing National Careers Service advisers/ colleagues to support referrals (through team meetings, newsletters, email and telephone)
- Contacting former/existing National Careers Service clients by telephone/email/letter
- Approaching employers, for example, local authorities making staff redundancies
- Setting up events in the workplace e.g. ULRs running sessions as part of Celebration of Learning events
- Linking with local projects/ organisations delivering IAG to provide a complementary offer
- Carrying out consultation activities/ research with potential clients to identify their priorities/ needs and developing activities related to these
- Advertising on the organisation's website and using social media
- Targeting established groups and attending their meetings
- Embedding the work in to existing approaches e.g. Community Learning Champions drop in sessions
- Advertising at local job fairs

Some specific examples are included below:

Babcock employed different approaches and commented that clients were engaged through various routes. The manager reported very positive outcomes from advertising MLCR at job fairs and how the 'MLCR' banners they had produced attracted people to find out more. They did make some telephone calls to previous clients but did not pursue this for long as it did not prove to be effective. Word-of-mouth increased recruitment as the project progressed (e.g. through key stakeholders like JCP advisers). This provider did not struggle to meet the target in any way.

BSS had anticipated that inviting current clients to take part in a MLCR call would work well, however it did not and instead cold calling existing/former clients and completing reviews 'on the spot' were more successful. BSS also chose to pitch the offer as taking part in a research project and felt that this encouraged people to engage. This highlights the importance of targeting the right people and being clear about the offer.

Careers South West experienced good support and referrals from JCP, and offering lunch to clients helped with recruitment. They also accessed clients by working with employers and getting them on board. They stressed the importance of intermediaries as clients had some reluctance to self-refer.

Community Learning Champions engaged people who were already accessing some form of support from e.g. through their community drop-in sessions.

GMCP reported that reliance on employers was not feasible as it took time to get their buy-in. They felt that this could be an effective recruitment method but it takes time. They stressed the importance of using CRM data to target potential clients effectively.

Mary Ward Centre targeted particular learners and promoted their offer through mailings and posters. Tribal also used posters, but found personal contact to be most effective. Their clients also promoted the MLCR to others through word-of-mouth.

Key messages/ Critical Success Factors

- Confident, enthusiastic advisers who have strong networks and take a pro-active approach. Access to support is important.
- Effective partnership working, and making contact with the most appropriate individuals in external organisations to support referral
- Sufficient lead in time to engage key partners and develop an offer which is attractive to clients (venue, content, format) and can be easily communicated by advisers/ partners
- Perseverance with employers
- A marketing strategy
- Importance of face-to-face contact with clients to secure buy in
- Flexibility - being prepared to change approach if things are not working
- Importance of delivering a quality service to build up credibility and encourage word-of-mouth promotion

'I feel by making face-to-face contact... that is much more important because they are more likely to come back to future things, so in terms of investment it's worthwhile.' Project Manager

'Being able to identify the key issues for those particular workers and workplace are very important and organising the Mid Life reviews around those themes.' Project Manager

Impacts on pilot providers

Pilot providers reported a range of outcomes for their organisations as a result of participating in the MLCR project. Figure 16 below shows the positive outcomes which advisers identified for their organisations in the online survey. The most commonly identified outcome was an improved service for mid-life clients. Other common positive outcomes included the development of staff skills, stronger existing partnerships and greater client satisfaction.

Figure 17: Positive outcomes for pilot sites identified by advisers



Base: respondents to adviser survey who identified positive outcomes for organisations = 34

Managing the pilot projects

Pilot providers approached the task of providing the pilots in a number of different ways.

Key challenges and strategies for overcoming them

At the start of the project, the majority of pilots did not foresee any major issues in engaging clients and achieving their target number. A few National Careers Service pilots highlighted the need to ensure that demand did not outweigh capacity to deliver:

'The delivery managers tell me it's not a problem because they have some groups already waiting... because they've known about it [the project] for quite a while people have been thinking about it and identifying groups.'
Project Manager

'We have the potential to reach clients, but we do need to keep an eye on capacity.' Project Manager

In practice, recruiting clients for review sessions proved more challenging than anticipated for the majority of partners and became an ongoing activity during the lifetime of the project. The National Careers Service pilot providers had the aim of reaching 200 clients each. Some did not meet their target number of clients, although the majority of these were very close to achieving them, and overall the

project exceeded its target by almost 500 clients as Unionlearn and other partners were able to attract higher numbers than anticipated.

Pilots highlighted a range of issues related to the engagement of clients. These are summarised below.

Access to clients/ engaging employers and partners

There was mixed success in terms of employer engagement. Several pilots highlighted that even when employers are keen to participate, it can take time for arrangements to be put in place. One partner reported that an employer who they had approached at the start of the project contacted them in the final stages of the project to accept the invitation to participate²⁴. Time was also a factor in terms of securing buy-in from external partners and internal colleagues. Some pilots spoke of low number of referrals from partner organisations and National Careers Service advisers.

'It's all about the time. Job centres move very slowly. It's about how much time you've got to implement it because you're not just persuading the local manager, you're persuading the JCP advisers to promote it... With more time you can build that ownership, belief that it's going to help their customers.'
Project Manager

'I found it difficult to target employed people. The time it took to get in to employers, it just became disproportionately long... I wanted to interview a lot more employed people than I was able to.' Project Manager

'A number of employers we've approached have said it sounds great but we're sick of working with so many different programmes and projects and sometimes we don't always have good experiences.' Project Manager

These findings suggest that engagement of employers and other partners need longer term strategies. Short-term projects can result in employers and partners becoming disengaged with future work, as they put a lot of effort into getting the programmes up and running, only to have a very short input and limited outcomes. The managers of pilot providers need to be aware that it takes time to build relationships with employers and other partners, and these may come to fruition outside of the project timeframe. A long-term strategy would enable them to capitalise on these relationships. In order to engage employers, pilots need to develop a clear offer which sets out the benefits to businesses and employees.

Client perceptions and non-attendance

Several pilots spoke of clients not attending appointments, difficulties in contacting those who had agreed to a telephone review and clients changing their minds about taking part. In some cases group sessions had to be cancelled or postponed due to low numbers or the format was altered to one-to-one sessions instead. In

²⁴ They agreed to conduct reviews with their employees outside of the project timeframe.

Yorkshire and the Humber, a similar project providing careers advice to over 50s was running and targeting the same cohort of people²⁵ and this required a re-think in the pilot provision. In a few cases, potential clients could not see the value of taking part or perceived the project in a negative way; of course this was not surprising with such a new offer, and no service will suit everyone. However, adviser awareness is important in achieving successful take-up.

Staff capacity and skills in managing the pilot projects:

There were some challenges due to the use of existing staff with busy workloads and competing demands on their time e.g. National Careers Service contract, National Careers Service re-procurement process, Ofsted inspection. A number of pilots were affected by re-structuring processes which had implications for capacity. In some pilots it took time to get advisers on board with the project which inevitably delayed the engagement of clients. One non-National Careers Service pilot particularly struggled to engage individuals to support delivery. It was also noted that in some cases, especially early on, advisers were unclear about the exact offer to clients (i.e. how it differed from existing provision) and as a result were not confident to promote it to clients.

'Unfortunately I've had to focus on my other responsibilities.' Adviser

'We had to be really careful that we didn't end up with more people than we could cope with.' Project Manager

'It's about how you market a project as well to customers, so what's in it for them... you have to have a clear menu of what you are going to do with them and I think that hasn't necessarily been the case.' Project Manager

Time and budget constraints within the pilot projects

Many of the challenges arose from the constraints of time and budget in a fixed term project. They affected the availability of advisers and clients, resources for promotional materials and activity and the ability to establish links with employers and partners.

'We have had that transitional period and really not that long to settle into the project.' Project Manager

'I think part of the challenge was harnessing the demand with no real marketing budget. At the beginning we anticipated we couldn't do much of a marketing exercise.' Project Manager

25 DWP and JCP had sponsored/ supported a local VCO (who work +50s) to do some careers advice work with them: "They took all our referrals ... we've been left with the ones they couldn't do".

The actual timing of the project also proved difficult for some pilots. For example, for some Workplace Learning Advocates, the project took place at one of the peak times for their company which affected their capacity and that of their colleagues.

'So many things going on in the workplace. I think it came down to time and I think the summer holidays was a big issue.' Project Manager

Pilot project managers had generally assumed that recruitment would be straightforward and achieved very quickly. In reality, it was more challenging than expected, partly due to advisers taking more time than anticipated to become familiar with the messages and the need for awareness raising. To overcome the challenges, most pilots increased the number of approaches to recruitment they used. Strategies used to boost recruitment and achieve targets included:

- Extending the geographical scope for the project/ using more and different venues e.g. job centre
- Widening the client target group (e.g. both employed and unemployed people, broadening the age range, targeting their own workforce)
- Regular promotional activities to National Careers Service advisers/ key partners, and engaging more partners.
- Advisers sharing information on 'what works'
- Contacting clients in different ways e.g. phone and email
- Broadening the offer – group and also one-to-one sessions
- Increased staff resource on the project, and providing more support to staff
- Sending reminder texts to clients in advance of their review
- The project delivery period was also extended by a couple of weeks.

It was also noted that as delivery progressed, advisers found it easier to 'sell' the sessions to potential clients because they were more familiar with the format and potential benefits to clients. In one pilot, an administrator took part in a review session and therefore was able to describe the session in detail to those who were interested in attending.

One pilot spoke of leaving individual teams to 'roll with it'. However this didn't happen, despite the statistics indicating that mid-life clients were accessing the National Careers Service. In hindsight there needed to be a more pro-active approach from project management and more training of advisers from the project itself and from the providers.

Sustainability and implementation of the pilot models

All of the pilots involved in the project intended to continue their MLCR activities in some shape or form. The most common approaches to sustainability involved embedding mid-life activities within their wider guidance offer; sharing and cascading best practice to advisers not involved in the project; and continuing to use the resources found or developed as part of the project.

Embedding the mid-life offer within their wider service

By embedding the mid-life offer within their wider service, the majority of pilots were hoping to continue the work they had developed as part of the project without applying for additional funding. These pilots felt that at least some aspects of their pilot activity, such as the use of resources specific to mid-life issues and the specialist expertise of advisers, could be built into their mainstream delivery. National Careers Service pilots were hopeful that the new National Careers Service contract would enable them to continue delivering some of the more tailored provision they had developed through the project, such as group sessions and workshops. In the meanwhile, they were planning to build some best practice with this age group into their existing provision, for example by having a longer networking session to help clients overcome their sense of isolation.

Non-National Careers Service pilots were also exploring ways to embed their mid-life offer within their wider activities, but this was often accompanied by a search for funding to continue delivering their tailored sessions. For example, while the Mary Ward Centre was exploring funding opportunities to continue delivering and to further develop their group workshops for mid-life clients, they were also starting to build employability skills and careers guidance into their current learning provision.

'We've really got a handle now on this aspect of provision; we've got the seed now and we feel confident that it can grow and it's worth growing.'

Project manager

Unionlearn and Workplace Learning Advocates were working with employers to continue their MLCR activities. Unionlearn were developing a three-year strategy for their ULRs and are intending to include the MLCR as a central theme within this. They will be encouraging all ULRs to consider how they can support the mid-life development of their colleagues. Similarly, Workplace Learning Advocates plan to build information and advice on mid-life issues into the work they carry out in their roles and will also be working with employers to build mid-life issues into appraisals for all employees.

Implementation

A considerable level of implementation has been achieved through the current project. MLCR now has a currency of its own in the ageing and guidance sectors. There are at least three key achievements; most notably, career management has been included as a target outcome in the new contracts for the National Careers Service prime contractors and one of the potential measures of career management is MLCR. This means that National Careers Service contractors can claim output-related funding for achieving milestones related to the provision of MLCR, although further work may need to be done on the evidence of impact for clients. Further embedding into usual practice has been achieved by union learning reps and workplace learning advocates who are training their volunteer participants to deliver the first parts of the process of MLCR within their remit.

Sharing and cascading best practice to advisers not involved in the project

All of the pilots said they were keen for the advisers who had delivered the project to share the lessons they had learnt with those who had not been involved in the pilot activity. Partners were planning to take this forward in a number of ways, including building mid-life issues into formal training sessions and CPD for advisers; setting up cluster groups for sharing of best practice; and having Mid-life MLCR Champions or specialists who could act as a first port of call for this age group. Partners agreed that it was important to maintain the enthusiasm and motivation about working with this age group, but the main barriers to achieving this was the amount of time advisers would have to commit to a specialist role and finding the funding to deliver specific training on mid-life issues.

“There are a lot of advisers out there who would really benefit from using our resources and using our model.” Project manager

Continuing to use resources found or developed during the project

One of the main ways in which pilots were intending to sustain the work they carried out as part of the MLCR project was by continuing to use the resources they had found or developed as part of their pilot activity. This is supported by the resource platform developed by NIACE, which comprises a library of resources collected during the project. All partners submitted work to this resource, which was supplemented by additional materials gathered by the project team. More details and the link to the library can be found at Appendix D.

In addition to being available on the central resource, some pilot providers, such as CfBT, developed a resource pack or toolkit which their advisers could use with future mid-life clients. Others were planning to make the materials and resources used in the project available on their organisation's intranet and webpages, and promote these to all of their advisers through network meetings and events.

“It's something that I think will stay there and that advisors can use any time.”
Project manager

Expanding the service to other formats, partners or client groups

As well as continuing with the activities they started to deliver as part of the project, some pilots were looking to expand their mid-life offer to other delivery formats, partner organisations or client groups.

The majority of pilots used face-to-face, one-to-one formats to deliver their MLCRs. However, a small number of pilots were considering developing their offer to include other delivery modes in the future. For example, BSS were considering how they could use an email approach to deliver MLCRs, while GMCP were exploring ways in which they could link this provision with telephone interviews and the future National Careers Service telephone contract.

Many of the National Careers Service pilots involved at least one of their sub-contractors in the delivery of the MLCR project. By the end of the project, the

majority were already exploring the best way in which to roll out the mid-life offer across all of their sub-contractors. Some pilots were arranging meetings with their sub-contractors to share their lessons learnt and encourage them to offer a more tailored service to this age group.

As well as extending their m MLCR offer to their sub-contractors and partner organisations, a number of pilots were looking to develop specific provision for groups within this age range. For example, GMCP were considering how they could apply the lessons they learnt from their pilot to their work with offenders, while Prospects had already arranged for one of their advisers to start delivering their mid-life workshop in a local college. Similarly, non-National Careers Service pilots such as the Mary Ward Centre and Works for Us were exploring the ways in which they could adapt their IAG offer for other specific mid-life groups such as ESOL learners and carers. However, these developments tended to be contingent on organisations gaining further funding to continue their delivery, or, in the case of Works for Us, recruiting sufficient volunteers to support its delivery.

[Applying for funding to continue delivery](#)

Around a third of pilots indicated that they were applying for funding from both local and national sources in order to sustain their work. If successful, pilots were intending to use this additional funding to deliver formal training to their advisers and further develop the resources they had designed for mid-life clients. The only pilot which had successfully secured funding to continue their MLCR activity as a separate project was Tribal. They gained joint funding from the National Offender Management Service (NOMS) and the European Social Fund to deliver an accredited two-day 50+ guidance programme in prisons across the South West. This success was a direct consequence of NOMS observing a session delivered as part of Tribal's MLCR pilot.

4. Appendices

Appendix A: Methodology

Three partner workshops were held for pilot providers. The workshops provided the NIACE research/project team with a good opportunity to share findings with partners and facilitate learning across the pilot sites. This was based on the principle of using a formative approach looped feedback to improve the project as it progressed, rather than just feeding back after it was over.

Partners provided monthly project reports throughout the piloting period. Gave details of the activities the partners undertook as well as their reflections on what was working well/ less well and why. This had the dual purpose of enabling the project team and researchers to intervene if pilots needed more help but also formed the first formal data collection tool.

Client monitoring forms were developed (to be submitted throughout the piloting phase). These provided basic information for each client attending a review and were the second formal data collection tool. Different forms were used for National Careers Service and non-National Careers Service providers. These forms also collected information on what topics were covered in the MLCR sessions. We hoped that pilot providers already collected much of this information already so partners could use the tools we developed to collect this information or could adapt existing forms. A monitoring data guide was provided.

Telephone interviews with the lead person/s for each partner were conducted. An initial interview was held with each partner during the first month of pilot activity. Telephone interviews were undertaken with 16 of the 18 original partners in July and August 2013. Interviews lasted 40-60 minutes each. The majority of interviews were conducted with the lead contact only. In five cases, another key member of the project team also participated. At the point of interview nine pilots had conducted review sessions, however most were in the very early stages of delivery. A second interview with pilots not selected as case studies were undertaken towards the end of the pilot activity, between November 2013 and January 2014. The second interviews enabled the research/project team to build on the information partners provided in their monthly reports and develop a deeper understanding of their pilot activity. Further follow-up interviews were conducted as part of the next phase of research in July and August 2014 and will be reported in full by March 2014. Follow up interviews were conducted with all but one of the 17 partners in August 2014.

An online survey to advisers conducting MLCRs was distributed towards the end of the pilot activity, and included questions about the MLCR process and its impact on both clients and advisers. NIACE estimates that around 200 advisers were involved in the delivery of the project. In total, 41 advisers responded to the survey, giving a

response rate of around 20 per cent. These advisers represented 16 of the 17 pilots involved in the project.

Case study visits were made to six pilot sites. Visits took place following the pilot activity, between December 2013 and January 2014, and involved a series of face-to-face interviews with key stakeholders, including clients. The visits enabled the research/project team to gather rich information from a range of perspectives. The findings of the case studies are incorporated into this report and can be found in full in Appendix E.

The project was keen to capture the views and experiences of clients taking part in the project. Where possible, clients were interviewed face-to-face during the case study visits. For two pilot sites, clients were interviewed by telephone. An external organisation, CfE, was commissioned to support NIACE in the analysis of the quantitative findings, specifically focusing on cost and benefits of the pilots. They worked closely with the NIACE research team and their findings are incorporated into this report.

Clients Follow-up Survey

The MLCR Clients follow-up survey was carried out one year after the start of the delivery of the Mid Life Career review project. In order to reach as many clients as possible, a survey methodology was chosen. The survey was made available in both online and paper-based formats, as the initial findings of the MLCR evaluation suggested that many clients were not confident in their digital skills.

Both the online and paper-based versions of the survey were sent to MLCR pilot partners for them to forward on to their contacts. NIACE provided the wording for an email invitation for clients, and pilots could request printed copies of the paper-based survey and self-addressed envelopes to send out to their clients.

To boost responses, a reminder email was sent out which included the option for respondents to enter into a prize draw for one of ten £25 gift cards.

Fourteen of the 17 pilots were able to send the survey onto a total of 1,700 clients (57 per cent of those engaged in the project). The remaining 43 per cent of clients could not be reached for a number of reasons. This included pilot partners not having permission from clients for them to be followed up; not having correct email or postal addresses for clients; and not having capacity to send paper-based copies of the survey to those without email addresses. The response rate was also affected by transfer of responsibility for the National Careers Service to new Prime Contractors, and changes in the National Career Service computer systems, both of which were happening at the same time.

In total, 161 responses were received to the survey, giving a response rate of 9.5 per cent of those approached. However, since this represents only 5% of those who undertook a review, results must be treated with some caution, and detailed analysis was not possible.

Appendix B: Review Forms

Pre-review form

Client ID		
Gender		
Male		Female
Age		
Below 40		55-59
40-44		60-64
45-49		65-69
50-54		70+
Ethnicity		
Asian or Asian British – Bangladeshi		
Asian or Asian British – Indian		
Asian or Asian British – Pakistani		
Asian or Asian British – Any Other Asian		
Black or Black British – African		
Black or Black British – Caribbean		
Black or Black British – Any Other Black		
Chinese		
Mixed – White and Asian		
Mixed – White and Black African		
Mixed – White and Black Caribbean		
Mixed – Any Other Mixed		
White – British		
White – Irish		
White – Any Other White		
Prefer not to say		

Do you consider yourself to have a long-term disability, health problem or any learning difficulties?			
Yes		No	
			Prefer not to say
Employment status			
Employed			
Self-employed			
Unemployed			
Economically inactive			
Retired			
Employed and voluntary work			
Self-employed and voluntary work			
Unemployed and voluntary work			
Economically inactive and voluntary work			
Employment security (only if employed)			
Permanent work			
Threatened with redundancy			
Temporary work			
Employment hours (only if employed)			
Below 16 hours a week			
16 or more hours a week			
Length of unemployment (only if unemployed)			
Less than 3 months			
3-5 months			
6-11 months			
12-23 months			
24-35 months			
36 months or more			
Learning status			
Learning		Not learning	
Type of learning (only if learning)			
Training in work			

Informal adult learning	
HE	
FE	
Highest qualification level	
No formal qualifications	
Level 1 or equivalent	
Level 2 or equivalent	
Level 3 or equivalent	
Level 4 or equivalent	
Level 5 or equivalent	
Level 6 or equivalent	
Level 7 or equivalent	
Level 8 or equivalent	

How client heard about pilot	
Community Learning Champion (CLC)	
Employer/employment agency	
Financial services (financial advisor, credit union)	
Health centre/worker	
Housing association	
Jobcentre Plus (JCP)	
Learning provider (FE college, adult learning, university)	
National Careers Service	
Union Learning Rep (ULR)	
Voluntary or community organisation	
Workplace Learning Advocate (WLA)	
Self-referral/word of mouth	
Other	

During review form

Client ID	
Length of review (select one)	
Half an hour or less	
Between half an hour and an hour	
Between an hour and an hour and a half	
Between an hour and a half and 2 hours	
Longer than 2 hours	
Delivery mode (select all that apply)	
One-to-one, face-to-face	
Group session	
Telephone	
Email	
Online chat	
Other	
Please specify:	
Reason for taking up MLCR (select all that apply)	
Redundancy, now or imminent	
Afraid of redundancy or unemployment (no formal notification)	
Unemployed, seeking work	
Seeking change in working arrangements	
Seeking promotion/new challenges	
Seeking new career/job in same sector	
Seeking new career/job in different sector	
Other	
Please specify:	
Topics covered in review (select all that apply)	
Career development	

Gaining employment	
Self-employment	
Retirement options	
Training/learning opportunities	
Volunteering	
Relationships	
Finances	
Health	
Housing	
Caring responsibilities	
Other	
Please specify:	
Retirement expectations (select all that apply)	
Retire fully in next three years	
Retire fully in more than three years but within next 10 years	
Retire fully more than 10 years away	
Retire gradually through part-time work	
Retire from present job but take up a new role/job	
Never retire	
Don't know	
Not discussed	
Current occupation area	
Accommodation/food service	
Administrative/support service	
Agriculture, forestry and fishing	
Construction	
Education	
Electricity, gas, steam and air conditioning supply	
Financial/insurance	
Health/social work	
Information and communication	
Manufacturing	
Mining/quarrying	
Professional, scientific or technical	
Real estate	
Transport and storage	
Water supply; sewerage, waste management and remediation activities	
Wholesale/retail trade	
Not discussed	
Other	
Please specify:	
Current occupation level/group	
Manager, director or senior official	
Professional	
Technical	
Skilled trades	
Sales or customer service	
Caring, leisure or other service	
Administrative, clerical or secretarial	
Process, plant and machine operatives	
Other non-manual	
Other manual	
Not discussed	
Other occupation	
Please specify:	

Employment history (select all that apply)	
Continuous employment	
Employed for majority of working life with a few spells of unemployment	
Frequently unemployed throughout working life	
Long-term unemployed	
Same level throughout working life	
Progressed up levels during working life	
Differing levels throughout working life	
Same employer for entire working life	
Different employers during working life	
Not discussed	

When highest qualification acquired	
Last 5 yrs	
5-10 yrs ago	
More than 10 yrs ago	
Not discussed	

Time since last engaged in education or training (with or without qualification)	
Currently in learning	
Less than 3 years	
3-10 yrs	
Since leaving full-time education but more than 10 yrs ago	
Not since leaving full-time education	
Not discussed	

Next steps with you/your organisation	
A face-to-face, one-to-one session	
A group session	
A telephone session	
Organisation's website	
Ongoing contact with you/your organisation (e.g. email mentoring)	
None	
Other	

Please specify:	
Next steps to take independently	
Work through hard copy materials provided by adviser	
Work through online materials provided by adviser	
Explore opportunities to learn/train	
Explore retirement options	
Explore volunteering options	
Explore flexible working options	
Other	

Please specify:	
Did you signpost your client to any of the following? (select all that apply)	
National Careers Service	
Learning provider (FE college, adult learning, university)	
Community Learning Champion (CLC)	
Employer	
Financial advisor/service	
Health centre/GP	
Housing association	
Jobcentre Plus (JCP)	
Union Learning Rep (ULR)/union	
Voluntary or community organisation	
Workplace Learning Advocate (WLA)	
Other	
Please specify:	

Appendix C: Links to literature review and further reading

[A literature review](#) was produced during the project and can be found on the NIACE MLCR website.

Unionlearn report [Mid-life MLCRs - Helping older workers plan their future - Evaluation report](#)–June 2014

Appendix D: Resources

Link to MLCR Online resource library: <http://www.xtlearn.net/p/mlcr>

Films:

NIACE Mid-Life MLCR Film <http://www.youtube.com/watch?v=FslpFFM-a9U&list=PL3E561E04D0A7CD76&index=14>

Video highlights work of ULRs in midlife MLCRs

<http://www.Unionlearn.org.uk/news/2014/03/19/video-highlights-work-ulrs-mid-life-career-reviews>

Appendix E: Case Studies

A series of 6 case studies was developed during the MLCR project and these are included here.

MLCR case study: BSS

Background

BSS has over 35 years' experience as a not for profit organisation, managing advice lines for a variety of health, employment and charitable organisations. One of their main contracts is for the National Careers Service. Their careers advice contact centres operate from 8am to 10pm seven days a week and offer support across telephone, email and web channels.

BSS has found that their advisers can struggle to offer reasonable resource, encouragement and advice to midlife clients. This is due to the wide range of issues and barriers that these clients face, not only in relation to work and learning but also in their personal lives. BSS was therefore keen to get involved in the MLCR project in order to improve their advisers' confidence and skills in supporting this client group.

How it worked

The sessions delivered as part of the project were not presented as MLCRs to clients. The advisers involved in the project felt that "review" implied that clients already had a career in place and that the session would only be relevant if they were looking to make a change. Therefore, clients were instead offered the opportunity to take part in a mid-life career research project. The aim of the session was to find out: what clients' priorities were; what concerns they had; and what issues they had already addressed.

Although BSS supports clients through telephone, email and web channels, their MLCR pilot was only delivered over the phone. This decision was made for a number of reasons. Firstly, not all of the advisers involved in the pilot were trained on the email and web channels. Secondly, clients were identified for the project based on their age and this can be difficult to establish over email and through webchat. Finally, sessions take much longer to carry out through email and webchat than over the phone. Focussing on telephone delivery therefore enabled BSS to deliver a consistent and comprehensive offer to midlife clients.

In total, eight advisers and four quality coaches were involved in delivering BSS's MLCR pilot. Advisers were invited to participate in the project based on the quality of their calls and whether they had shown an interest in this client group. The quality coaches were brought on board to support advisers in the pilot, as they have a lot of experience in working with this client group and delivering careers advice in different formats, such as cluster groups, focus sessions and workshops. Therefore, if any of the advisers had any issues or queries they could go to the quality coaches for immediate support.

Advisers offered any clients over the age of 50 the chance to participate in a mid-life career research session. Their initial approach was to refer people who were coming through their usual service to an additional call with an adviser who was involved in the project. This adviser would then call back at an arranged time to conduct the research session. Towards the end of the project, advisers and quality coaches also identified clients who contacted BSS in recent months who they felt might benefit from involvement in the project. These clients were cold-called by advisers.

Client issues/needs

The project managers and advisers felt that their MLCR model had been well-received by clients. In general, clients were keen to be involved in the project as they felt it was relevant to their own experiences and future aspirations.

'The majority were keen to talk about it, because they've all encountered issues or were about to.' Project Manager

Advisers found that many clients were prepared to continue working for as long as they mentally and physically could. Many struggled to envisage what their retirement would involve or were unsure about how to make the step into retirement. However, there were recurring concerns about age discrimination amongst clients and many felt this acted as a barrier to them continuing to work.

'It was as though they were trying to say, 'I've got all this experience, but that isn't going to be seen, all that will be seen is the number: the age'.' Adviser

Finances were another major issue for midlife clients. Those who were unemployed or self-employed tended to manage their finances on a day-to-day basis and had little in the way of pensions or savings. For these clients with insecure personal finances, they had no option but to try and continue working for as long as possible.

'It all boiled down to finances; people knew what they would ideally like to do, but they had to hold back and not make plans because they didn't know if was realistic.' Adviser

In contrast, clients who had had a secure income for the majority of their working life were less concerned about their finances in relation to retirement. Instead, they found the idea of retirement unappealing as they were keen to stay active and contribute to society. They were therefore more likely to seek advice on moving into an occupation they would enjoy doing in later life.

Finally, many midlife clients perceived their low IT skills as a major barrier to their continued ability to work and earn. Some clients felt they were not up-to-date and were intimidated at the prospect of competing with younger candidates for jobs.

Benefits and impact

Clients

The feedback from the clients involved in the project suggested that they appreciated the opportunity to talk to an adviser about midlife issues. They felt that they were being listened to and their issues and concerns were being taken seriously by advisers. As well as enabling clients to identify and discuss the barriers they were facing, advisers helped them to take steps to overcome these obstacles. This included: exploring learning opportunities to address gaps in their IT skills; signposting to further information on job roles and sectors appropriate to their skills sets; and taking up activities to reduce their feelings of isolation.

'You can talk about those things, they are relevant and you shouldn't have to feel silly talking about these things.' Adviser

Advisers

As the project developed, advisers became more confident to deliver sessions with midlife clients. They attributed this to the time given for them to focus on working with and supporting this age group, rather than the mixture of people they usually work with. This meant that advisers could recognise recurring / reoccurring issues and understand how they can best support midlife clients to address these. This has helped advisers to develop their delivery of the sessions and how they discuss career options with midlife clients. They now feel better equipped to support clients in this age group and can tailor their approach depending on a client's needs.

'A lot of them were saying the same things... It started me thinking about how I would deal with that when I came across it again: what tools would I use and what open questions would I use.' Adviser

This focussed work on midlife clients also helped advisers to realise the value of providing reviews for clients in this age group, and what benefits they could experience as a result. However, advisers also found the project useful in helping them to reflect on their own circumstances and future aspirations.

'When you ask questions to people... you can't help but think how would I answer that question, and that's helped me to see the value of it as a review.' Adviser

Organisation

The project managers felt that the MLCR had raised the profile of BSS, not only with midlife clients but also with other organisations which they had signposted clients on to. They are confident that they can continue to provide this additional service and this will enrich their overall offer to clients of all ages, as the advisers will bring the lessons they learnt from this project to their work with all clients. Furthermore, this experience will enable BSS to deliver future projects more effectively in collaboration with other providers.

Issues and challenges

The main challenge which BSS faced in delivering the project was the high no-show rates for appointments. Clients were often unavailable at the arranged time for their mid-life career research session. This resulted in advisers spending more time than they had anticipated chasing clients and rearranging calls.

'It was quite messy to start with. I think we thought it would be quite easy, but the mechanisms weren't there in place.' Project manager

Mid-way through the pilot it was apparent that this approach to client engagement was not effective. One of the project managers therefore pulled together a list of midlife clients who had engaged with the service in recent months and had agreed to be followed-up by phone. Advisers then started cold calling these clients and conducting the research session with them on the spot. This had a very positive response and resulted in BSS over-recruiting for the project.

Critical success factors

- The capability and experience of the advisers working on this project: These advisers were already highly experienced at delivering guidance and had an interest in this age group. This project allowed them to draw on their existing knowledge to develop and tailor their approach to midlife clients.
- Strong support for and communication between advisers: Having the quality coaches on board gave advisers a source of consistent and regular support. Advisers also appreciated the opportunities to have regular contact with others involved in the project and share practice.
- Cold calling existing clients: This was a huge success in achieving the required number of clients for the project and overcame the issue of no-shows on arranged calls.
- The simplicity of the model: The model did not require advisers to use a huge number of materials; instead it was based on holding conversations with clients and exploring their experiences and concerns. This helped advisers to improve their approaches to engaging with and supporting midlife clients.

Sustainability

BSS are not only continuing the work they have started as part of their MLCR pilot but are looking at ways to extend this to the rest of their service. They are planning to set up cluster groups between the advisers who worked on the pilot and those who did not, so that the skills and experience they gained can be cascaded to others. BSS are also considering extending their midlife offer to their email and web channels once they find a way of accurately identifying clients through these routes.

MLCR case study: Community Learning Champions

Background

Community Learning Champions (CLCs) are volunteers who inspire and support friends, neighbours, relatives, colleagues and a wide range of other people across their communities to engage in learning. CLCs work in a wide range of settings and are supported by host organisations of many different kinds including local authority adult learning services, large national charities, community organisations and employers. The Norwich Community Learning Champions scheme is well-established and supported by People Shaped Solutions, a community interest company. Their CLCs carry out regular activities to promote the value of learning and provide initial information and support to community members looking to get back into learning.

How it worked

The aim of the Community Learning Champions pilot was to support some of the most disadvantaged members of their local community to achieve small steps towards their long term goals. As volunteers, CLCs were not asked to carry out MLCRs, but instead to act as the initial contact for mid-life community members and signpost them onto further information and advice. The scheme's MLCR activities were embedded within their existing CLC work.

The CLC model is based on having an informal chat with potential learners. The additional funding from the MLCR project enabled CLCs to take this further and have more in-depth one-to-one sessions with people. The majority of clients were engaged through the regular drop-ins CLCs hold in various locations around the community, or through group sessions with service users of partner organisations or groups that People Shaped Solutions already worked with. The CLCs embedded the tools and resources provided through the project into their sessions, talking about different options and inviting comments or inputs which would often lead to a healthy discussion between clients.

If clients needed further support, these initial engagements were followed up by one-to-one meetings in a cafe or similar setting. This enabled clients to go into more detail about their aspirations and the issues or barriers they faced in relation to these. CLCs could then signpost clients onto further relevant sources of information or support on a wide range of topics, including learning or volunteering opportunities, finding work and health. Crucially, all clients were offered as many follow-up sessions as they needed to support their progression and help them to achieve small steps towards their goals.

Benefits and impact

Clients

The CLCs model resulted in a wide range of benefits and impacts for clients who would not normally access careers information, advice and guidance. This was demonstrated by the fact that the scheme was hoping to signpost more people

than they did to the National Careers Service, but when they started speaking to clients it became apparent that they did not feel confident to access such a formal service.

'We've actually made quite a big difference to a lot of people who might not have had the opportunity otherwise.' Project manager

The ability to run more in-depth sessions meant that clients could disclose more of their personal issues, for example around physical or mental health, and get some specific and tailored information and support from the CLCs. This often enabled them to start taking some steps back into meaningful activity, such as attending more social events, participating in informal learning or volunteering. The subsequent activities and learning which clients engaged with helped them to meet new and different people, reduce their social isolation and increase their physical activity.

Client A had recently been diagnosed with depression as a result of his social isolation. He engaged with the CLCs at a drop-in session at the local library. One of the CLCs offered to have a more detailed chat with him and gave him some advice about taster sessions and other activities he could get involved in. She also found him some stress-control workshops which were run by the local wellbeing services. Client A attended all six of the workshops and as a result started engaging in some more positive activities, including volunteering at CLC events and sessions. This has helped him to make new friends and given him a greater knowledge of what kinds of events are happening in his local area.

'I certainly feel that I'm moving forward... I do have some idea of the sorts of things I needed to do. At first I didn't have a picture or a plan but now I've got a clearer picture of the sorts of things I should be doing.' Client

In the longer term, the scheme is hoping that this increased engagement in positive activities will improve clients' mental health, reduce their social isolation and increase their confidence to gain employment. Those who had been long-term unemployed tended to have very low confidence and self-esteem. In small communities such as this, people can also be very isolated and do not actively socialise with others. Hopefully these people can stay engaged and their feelings of self-worth and wellbeing will improve.

Client B joined the CLC scheme in 2011 and was long-term unemployed following a nervous breakdown. However, he had not been active within the scheme for over a year and had effectively 'dropped out'. Client B met a CLC at a community event where they had a long chat about the personal problems he had been experiencing over the last year which had impacted on his confidence and engagement in activities. He was keen to start building his confidence and to get back on board with the CLC scheme. This initial meeting was followed-up by a short informal conversation where Client B said he wanted to learn about IT. The CLC signposted both the client and his partner to a computer course which People-Shaped Solutions had organised in the community. Client B's partner had learning

difficulties, very low confidence and did little outside the home where she could meet new people, but was keen to get involved in the IT lessons.

Client B now feels far more confident and has been getting involved with the CLCs' work. He is going to start an accredited community volunteering qualification. His partner has made new friends with other learners at the centre and has joined a new fitness class as she has gained the confidence to get involved in learning.

Community Learning Champions

Prior to the MLCR project, the Norwich CLC scheme had been struggling to sustain its work due to a lack of staff capacity and funding. The benefits for clients arising from the MLCR project has reinvigorated the scheme and given CLCs renewed motivation and desire to continue volunteering.

As part of the project, the project manager has been developing and updating a signposting resource to support their CLCs' work. This includes lists of local organisations which can provide further information, advice on guidance on a range of issues which may affect those in mid-life, including health, finances and caring responsibilities. As a result, CLCs are now more confident when signposting clients and learners onto further support and feel that their approach has improved.

Due to the renewed motivation and interest of the CLCs involved in the project, the project manager has been encouraging all of their CLCs, even those who were not involved in the pilot, to share their experiences and any useful information they find across the CLCs network. This has improved the communication between their volunteers and has encouraged other CLCs to get back on board with the scheme.

Organisation

As part of developing the signposting resource for CLCs, the scheme has made contact with many partner organisations which they had not contacted for some time. This has resulted in a greater awareness of the scheme and People-Shaped Solutions amongst other community organisations.

'This put us back on the radar with a lot of organisations, a lot of people, that we'd lost touch with, and as a result of that I've had a couple of meetings with different organisations about what we're doing and how we could look at working together again more effectively.' Project manager

The project has also enabled the scheme to start recording information about the clients they support and their learning needs, as well as evidence of the impact that the CLCs have for individuals and the local community. This has already helped People-Shaped Solutions to develop their learning offer to better suit the needs of potential learners. The organisation is now running free, community-based taster sessions in a range of subjects including painting and decorating, dance and fitness, and IT. This has had a great response from the local community and they are hoping to develop these sessions into full learning programmes. The evidence of impact

collected through the project will support the scheme in applying for the funding required to achieve this.

'It's reinforced the difference that this can make even with a little bit of money.' Project manager

Issues and challenges

The main challenge faced by the project was getting the CLCs on board. CLCs are volunteers who are often unemployed and can lack self-confidence themselves. They therefore found the concept of delivering sessions to help others to develop their "career" a daunting prospect. To help overcome this, the project manager put on additional training for CLCs and allowed them to shadow her when she started delivering the sessions herself but there was limited take up. In the end five CLCs participated in the project.

The relatively small number of CLCs involved in the project and the unexpectedly high demand for follow-up sessions had capacity implications for the pilot. This was a huge draw on the scheme's resources and meant that the project manager had little time to engage with the CLCs who chose not to take part. However, the project manager is confident that the renewed enthusiasm for the scheme's work will bring these CLCs back on board and even attract new volunteers to the project.

Critical success factors

- The informal nature and setting of the pilot activities: *"It's based where people are, where they can feel comfortable, where they can access and it's informal."* Project manager
- The ability to listen with no agenda: Clients appreciated the time given to them and felt that the support they received was genuinely in their best interest.
- The extent of knowledge within the scheme about what support is available in a holistic sense meant that CLCs could talk confidently about a wide range of issues relevant to mid-life clients.
- Offering further follow-up sessions to clients: This was key to keeping people engaged with the scheme, especially those who had been let down in the past by other, more formal organisations.
- Developing their offer based on feedback from clients: This not only supported clients to address some of their needs but also opened up the opportunity to engage new people on the project.

Sustainability

The scheme will continue to engage with the clients who participated on the project. The CLCs will also continue to record data about the people they support and the scheme will use this to inform its future learning offer. The project manager is hoping to offer CLCs training in interviewing skills and basic IAG. The main barrier the scheme faces is funding. However, the evidence of impact that the CLCs have gathered through this project will support future funding applications and hopefully improve their chances of success.

MLCR case study: Greater Merseyside Connexions Partnership

Background

Greater Merseyside Connexions Partnership (GMCP) currently holds two National Careers Service contracts providing a face-to-face service in the North West: Cumbria and Lancashire (North) and Cheshire and Warrington and Greater Merseyside (South). GMCP has a large direct delivery team and 27 sub-contractors.

For GMCP, the MLCR pilot project presented an interesting, potentially innovative, opportunity and the chance to explore market demand:

'The prime motivator was more around interest, organisational curiosity as to what the issues would be, what could we bring to the table and what could we offer the client group.' Project Manager

How it worked

The project was managed by an experienced careers adviser at GMCP. It involved a partnership between GMCP and two of its sub-contracting organisations: Preston College and Vedas. By adopting a partnership approach, the pilot could work with a range of client groups and trial different models of delivery.

Strand 1: GMCP

The Project Manager designed an individual face-to-face session, lasting around 90 minutes. The priority target group for the sessions was employed people, including employees under threat of redundancy. The single intervention approach fitted with the current National Careers Service model whereby those in employment are entitled to one face-to-face session with an adviser:

'I felt from the beginning that if I came up with a model that was reliant on three interventions it would disadvantage employed people.' Project Manager

Around 100 reviews were undertaken. These were conducted by the Project Manager and other National Careers Service advisers who s/he had trained. Some of the clients who participated were unemployed.

Client engagement strategies included working with employers, referrals from National Careers Service advisers, contacting former National Careers Service clients, and limited advertising.

Clients were contacted by telephone prior to the review session and provided with further details about the content of the sessions, which included a focus on work, skills and training, volunteering, pensions and health.

In Merseyside, for a limited time, the mental toughness tool was used with clients.

Strand 2: Preston College

An experienced adviser carried out 18 individual face-to-face reviews. All clients were employees at risk of redundancy, and most had worked for their employer for many years.

MLCR sessions were promoted at National Careers Service events taking place on employer premises. Reviews lasted between 60 and 90 minutes and utilised a number of tools including the Rational Career Planning Model and the Transition Cycle by Adams, Hayes and Hopson (1977).

Strand 3: Vedas

Vedas engaged a total of 65 clients in individual reviews and workshop sessions (e.g. Interview Techniques). All activities took place at the Vedas office, led by an experienced adviser. The majority of clients were unemployed. Former National Careers Service clients were contacted about the offer and referrals were made by Job Centre Plus staff.

'Instead of being very focused on work... it was more of a general conversation. We tried to keep it really tailored to that individual.' Adviser

Benefits and impact

Clients

All partners had systems in place for gathering feedback from clients. The benefits for clients have been numerous.

The review process provided clients with an opportunity to take stock and reflect:

'The key thing that people tended to say was that it made people stop and think and want to address things in their lives.' Adviser

Clients found out about and explored different options open to them, for example training. They also learnt about other sources of support they could access:

'I think its awareness really. Being with the same employer for such a long time... being aware of the opportunities.' Adviser

'Made them aware of the training they can undertake. That was refreshing. And also that point of contact. Somebody to talk to. Think some of them felt after receiving the news about being made redundant that there was no help out there.' Adviser

'It introduced people to the National Careers Service and its existence.'

Adviser

For many clients, one of the main benefits has been a boost in confidence, which had a positive impact on their motivation to move forward and take action:

'The common theme was confidence... A lot of the people seemed to have real confidence issues. That fed through every single person to some extent... A lot of the sessions, although it might have been finance, returning to the labour market, deep down a lot of it was all confidence building.' Adviser

'It opened up learning doors to adults. And it opened up learning doors to people who often thought that they were too old to study or develop themselves.' Adviser

Following the reviews, clients went on to make plans, look in to pensions, housing and/or health matters, and take up learning.

'It made them realise actually I should be looking to develop myself. I've got to potentially stay in the workforce for another 20 years and that needs me to maintain and update my skills... It certainly encouraged people back in to education and adult education and that's the biggest benefit.' Adviser

Some clients progressed in to work or changed their employment.

One client, under notice of redundancy, attended a National Careers Service session on CVs at her workplace and was offered a MLCR session:

'Because I'd been in the job role I had for a while I was keen to receive any help that I could.'

She had found the careers adviser very helpful and the content of the review session was appealing. It proved a thought provoking and emotional experience:

'I said I felt under confident and we looked at why that was and he was able to probe deeper and find, and he was right, I hadn't really been doing a job that was making the best of my skills and possibly I wasn't that comfortable in that job.'

Prior to the review, her plan had been to apply 'for any job'. However, the session prompted her to look for a job that matched her skills and experience.

Through the session she identified transferable skills and gained confidence. She also found out about a job vacancy which she was successful in applying for:

'Without the session I wouldn't have seen the advert for one thing, but being able to sell my skills and promote myself in the way that I did do I possibly wouldn't have been able to do without that session. Because as I say, identifying confidence issues was a major thing for me.'

Advisers

Advisers spoke very positively about the project and highlighted the knowledge, skills and experience they had gained from taking part. It gave advisers the chance to employ different models of delivery, and apply and develop their guidance skills.

'It's taken them out of the normal day to day style of interview and given them something that's extended them and pushed them...They've up-skilled and grown as an adviser as a result and that's been very beneficial and appreciated by them.' Project Manager

'Refreshing in terms of using the models. Applying what I'd learnt. It was good for my professional development.' Adviser

Advisers also valued the opportunity to work with a different cohort of clients:

'Working with people who'd been with the same employer for such a long time. It was good for differentiation. Working with skilled professionals rather than customers at the job centre looking for CV, maths and English.' Adviser

'I've developed while doing the project itself. I think that's because of meeting certain people. They're not the normal client base we usually get on the National Careers Service...It has been varied. I think this is the only project I've done that's had such a variation of people in such a small number.'
Adviser

One adviser commented on the diversity of clients s/he had supported:

'Some individuals were looking at maintaining their career path. Some were looking at winding down, maybe part-time. Some wanted a big career change.' Adviser

For the Project Manager there were additional benefits including access to events, project management experience and the chance to inform policy developments.

Organisation

For GMCP, the pilot met its objectives. It highlighted the demand for MLCRs and demonstrated the ability of the organisation and its partners to meet this demand and address the needs of clients. It provided the chance to try out different models to determine 'what works':

'An important benefit was gathering experience on knowing what works and what doesn't. It's left us better placed to take advantage of other opportunities as they arise and its allowed us to engage with a market segment that we've not got to grips with before.' Project Manager

Advisers now have access to a model to support their work with mid-life clients, and can also draw upon the specialist expertise of staff involved in the pilot. Through the project some staff development needs were identified which can now be addressed.

The project has allowed GMCP to strengthen its joint working with Preston College and Vedas. Stronger links have also been made with Unionlearn and local employers. Several employers have approached the organisation for further support.

Vedas highlighted a range of benefits from participation in the project, including the development of a two day interview techniques workshop that is now being used in another project they are running.

'Delivering this programme we've got a good reputation. Customers are telling their friends about us. I think it's improved our foot fall for the other programmes. Our name being more recognised in the local area.' Adviser

Issues and challenges

There was some concern about meeting the target number of clients within the time frame. One of the partners encountered staffing issues and had to reduce its role in the project. Also, engaging employers proved very time-consuming and as a result one partner widened its target group and used a range of client engagement strategies. Limited funding for marketing also made the task of engaging clients more challenging.

One partner, working across large rural counties, was reliant on the use of partner premises to carry out review sessions. At times, sourcing appropriate venues free-of-charge was difficult and resource intensive.

'Meeting the needs of customers when you haven't got premises of your own is a key issue.' Project Manager

Regarding the review session itself, some advisers were very nervous to discuss financial matters (i.e. pensions) with clients. They needed support on this topic and reassurance that signposting to specialist websites was acceptable.

'They were scared it would come back on them as financial advice.' Project Manager

Critical success factors

- Detailed research was undertaken to ensure the model developed by GMCP was based on evidence
- Taking a flexible approach and being prepared to revise the approach if necessary
- Choosing the right delivery partners and sharing ideas
- Experienced advisers, who have credibility with the client group
- Effective use of National Careers Service CRM data to target potential clients
- Providing the right environment for clients – a relaxed and private space to encourage open and honest communication

'They were stepping away from their normal place, for example the Jobcentre where it is very regimented. More relaxed environment. Able to deliver the 1:1s in private room...They can air their opinion and be quite open without anyone judging them which a lot of people said they hadn't had before.' Adviser

Sustainability

Across the partnership there is an appetite to continue the work; however this is dependent on funding. The current focus is on capturing and sharing key lessons learnt across the three partners and with the wider sub-contractor network, and considering how these lessons might be applied to other areas of work.

GMCP is exploring how the MLCR model could be integrated in to the National Careers Service offer. It is recognised that the session length would need to reduce; however there is a question mark over what content should be taken out. The session length was shortened slightly during the pilot but this was not easy to achieve:

'It's what you take out of it to make it effective...I didn't want to start taking things out of it which made it by definition a MLCR intervention. My view is once you start taking things like pensions out it ceases to become a MLCR model and it can be any model. But that by definition lengthened it.' Project Manager

Another idea under consideration is how they could link it with the National Careers Service telephone contract.

Vedas has plans to incorporate some of the questioning techniques used in the review sessions into their other work. Also, building on the MLCR approach, they hope to make their other services more tailored to the needs of individuals.

MLCR case study: The Mary Ward Centre

Background

The Mary Ward Centre is an adult education college located in Holborn, London which offers a broad range of courses covering subjects in the arts, humanities, business, languages, ESOL, health, computing and digital media. In the 2012/13 academic year, 23 per cent of the centre's learners were aged 46-59 and a considerable proportion of these learners undertook courses with a view to increase their employability or to develop new career paths. However, prior to getting involved in the MLCR project, the Mary Ward Centre offered little in the way of careers guidance to their learners.

The centre was keen to understand how they could best support learners in establishing new career pathways and to pilot some different approaches to career guidance. By participating in the MLCR project, they were hoping to develop a careers advice service for their students and beneficiaries and also to integrate an IAG aspect into some of their existing courses. This would also help learners to explore progression options within the centre as many are not aware of the range of provision they offer.

How it worked

The Mary Ward Centre delivered their pilot through two distinct strands. The first offered group sessions to mid-life students who had an interest in developing a career in some aspect of the visual arts. The second strand delivered general careers advice and guidance and was open to all the centre's mid-life students.

The visual arts strand was delivered by trainers and professionals from Mary Ward's Creative Arts team, who devised a workshop based on their own experiences of working in the visual arts. The session aimed to give mid-life visual arts learners the opportunity to explore the practicalities around and first steps towards developing a career in this field. The centre delivered three of these half-day workshops and promoted them through mailings to students and posters around the centre. Participants could then follow these up with one-to-one advice from specialists.

'A good way of going about things was to allow people an opportunity to explore things individually as a result of having their interest sparked by a workshop and then being able to get individual advice and guidance, and also the opportunity for people to learn from each other.' Project manager

The general careers advice and guidance strand of the pilot was delivered by two advisors. One adviser was a long-standing assessor at the centre providing initial advice for ESOL and Literacy learners. She was brought onto the project because of her interest in supporting this age group and her desire to develop her skills in delivering careers advice. The other adviser worked for City Lit, a neighbouring college, and was very experienced at delivering careers guidance to this age group. He acted as a mentor for the centre's adviser.

All learners between the ages of 45 and 55 were offered the opportunity to have a general, one-to-one careers advice session. This was advertised through promotional materials displayed around the centre. The sessions were tailored to clients' needs and therefore covered a range of issues, including managing a change in career, addressing skills gaps, and balancing caring responsibilities or health issues with a career.

'I think actually that holistic approach fits in very well with us as a college and our general ethos as well.' Project manager

The centre went on to develop a workshop based on the common issues arising from the one-to-one sessions with advisers. For example 'How to sell yourself but not your soul' workshop aimed to develop learners' skills in selling themselves to potential employers. The session covered aspects such as identifying transferable skills, completing job applications and dealing with and learning from rejections. Learners also had a question and answer session with three HR officers from Camden Council. This was extremely well-received and gave learners valuable insights from a large employer.

To maintain their new-found enthusiasm and motivation to explore career options, learners from both delivery strands were offered follow-up one-to-one sessions and ongoing contact with an adviser. The centre also developed and populated their own webpage with links to relevant materials, websites and testimonies.

Benefits and impact

Clients

One of the main benefits clients experienced as a result of the workshops was an increased confidence and motivation to look for employment or a new career direction. This was often attributed to the opportunity to discuss issues with their peers, which took away some of the isolation clients often felt about their situation. The workshops gave clients an increased focus which enabled them to identify achievable steps they could take towards their goals.

'People found benefit from having people who were in a similar situation and they could learn a lot and got confidence from each other.' Project manager

In particular, the feedback from clients suggested they appreciated the fact that the workshop was aimed at those over 40 rather than a wider age range. This gave clients the confidence to contribute to the session and discuss their own concerns related to midlife. It was also evident that clients valued having the input of a large employer who was able to give their perspective, provide tips, respond to specific questions, and reinforce and validate some of the points made by the trainers.

'It's confirmed that people at a mid-life point actually do need pertinent support and help, and also they might feel a bit inhibited if it was a generic workshop.' Project manager

Clients who engaged in the one-to-one sessions were given an action plan covering their current situation, their goals and what the agreed actions were, both for them and the adviser. The adviser then followed up these clients with additional information and useful resources and to find out whether they had taken their agreed actions. Some clients took practical steps towards their goals, such as researching learning opportunities with different providers, taking up additional training at work and applying for jobs. Others had accessed formal advice and guidance with the National Careers Service.

Advisers

The project has helped the adviser at Mary Ward to improve her confidence in delivering this type of provision. Initially, she found the prospect of delivering guidance to midlife clients quite daunting due to the wide range of issues that they face. However, she is now keen to do more training in this area and has applied to take up a formal IAG course. She is also looking at ways to embed advice and guidance within her teaching as an ESOL practitioner.

Organisation

The project managers felt that the pilot was highly successful and very informative for the centre. The project enabled the centre to gain a good understanding of careers advice and how they can deliver this alongside and within the learning programmes they offer. This will help them to develop and enrich their future offer for learners.

'This is something we can build on and develop in the future and it actually complements us as a learning centre to think about how learning can be directed so that it is giving people employability skills.' Project manager

The freedom of the project meant the centre could be creative and experiment with different modes of delivery. It has also challenged some assumptions the centre had made about their learners' skills in searching and applying for jobs, as they were not as confident in doing this as the advisers had expected. The pilot has therefore helped the centre to identify a need amongst their learners and explore how this can best be addressed.

The workshops with other pilots helped the centre to develop their knowledge of other provision and resources which they could signpost their clients onto. This meant that they were not reinventing the wheel but could recognise and utilise the wealth of resources which already exist for this client group. The project also resulted in improved links with these other careers guidance providers, as well as local partners such as Camden Council and City Lit.

Issues and challenges

One of the main challenges the centre faced was how they were going to provide for the wide range of issues that clients could raise in the sessions. The centre overcame this issue by developing a relationship with City Lit and getting one of their highly experienced advisers on board at the start of the project. Another challenge the pilot experienced was the difficulty in getting feedback from clients. On reflection, the project managers would have built this into the model at the beginning, rather than chasing clients sometime after they had had their session. Nevertheless, the advisers were successful at following up and maintaining contact with clients from the individual sessions which provided the centre with the information they needed to develop their employability workshop.

Critical success factors

- Taking a flexible approach to delivery: The centre had some plans and ideas and worked through them but were flexible enough that they could develop and adapt their pilot according to clients' needs and expectations.
- Using a combination of individual and group sessions: This gave clients the opportunity to learn from each other and overcome their isolation, and then follow this up with a more tailored individual session to address their specific needs.
- Involving experts in the field and in recruitment in the group workshops: This gave the sessions credibility as they either involved individuals who had successfully developed a career in the visual arts or those who regularly shortlisted and recruited candidates.

Sustainability

The Mary Ward Centre is keen to continue delivering careers advice workshops with their learners. Future workshops are likely to focus on midlife transitions and next steps, and may be aimed at the centre's ESOL learners. The main barrier the centre faces in continuing their delivery of the workshops is funding. However, the centre is already considering how they can more effectively embed careers advice into their existing and future learning programmes. Carer development is something they could easily embed into many of their courses and the project managers are confident that learners would welcome this.

'We've really got a handle on this aspect of provision; we've got the seed now and we're confident that it can grow and it's worth growing.' Project manager

MLCR case study: Tribal

Background

Tribal is an education support services company. It is the National Careers Service prime contractor for the North South West region (covering Bristol, Bath, North Somerset, Gloucestershire, Wiltshire and Swindon). Tribal has a direct delivery team and a sub-contractor network in an excess of 200 community-based and outreach venues. Around a quarter of its customers are aged 40 and over.

Tribal were keen to engage with the MLCR project as it provided the opportunity to offer additional support to customers aged 45 and over:

'People 45 plus have often been in a career that's no longer viable, that industry has gone or that job has disappeared. So it's about getting people to change direction. We felt with just the National Careers Service sessions, even if you send them away with lots of self-help, it never felt enough.' National Careers Service Manager

How it worked

Tribal's pilot activity had two strands, overseen by one project manager.

Strand 1: Community

In Bristol, three coaches (National Careers Service advisers) delivered MLCR workshops. Most workshops were held at the Careers Service hub, based in a community centre. Some workshops were delivered at local Job Centres.

Clients, predominately unemployed adults, attended two half-day workshops held one week apart. Workshop activities were developed using the Blueprint for Careers. Clients received a folder containing useful information, activities and links to resources.

The aim was to align the workshops with the individual National Careers Service sessions and provide a joined-up service:

'The preferred model was they would have had a session with an adviser first. They would then have a workshop. They would have a follow up session with an adviser to pick up on the workshop and the homework. Then the workshop again. Then another session. So at each point we were providing the one-to-one support.' Adviser

The main recruitment approaches were promotional material and referrals from National Careers Service and Job Centre Plus advisers.

Strand 2: Custody

At HMP Leyhill, one coach (newly appointed for the role) delivered mid-life review workshops to male offenders due for release within the next few years. The majority of those taking part were serving long sentences.

Clients attended two 2.5 hour workshops. Workshops were held during the day and also in the evenings. Some activities were similar to those being delivered in the community; but tailored to the client group and the resource restrictions within the prison. Information was also provided on employment law, self-employment, benefits and other support available to offenders on release from prison.

Some clients also met with the coach on a one-to-one basis to discuss individual needs and concerns, for example, disclosure, CVs, interviews and action planning.

Posters were used to advertise the project; however most recruitment was done face-to-face. The coach spoke to potential participants in person, visited the Over 50's group, and also attended inductions of new prisoners. She liaised closely with prison education staff and National Careers Service advisers, and some of the men who attended the workshops promoted it to others.

Benefits and impact

Clients

Benefits for clients were diverse and wide-ranging. They varied depending on the client.

For some clients in the community, it was their first experience of group work and initially there was some apprehension and nervousness. During the workshops their confidence developed and their level of engagement increased. Clients benefitted from interacting with others, and meeting people in similar situations to themselves. There was much peer learning and support in the groups.

'The group gives an opportunity for people to spark off each other. The ability to share, the ability to understand that they are not on their own, the opportunity to air opinions and discuss them with people who are going to understand. The group really offers that.' Adviser

Clients found out about different options available to them (e.g. volunteering) and also other support services they could access. Clients were considering new opportunities, making plans and some had moved in to work.

'One guy said it's so nice to come and chat to somebody who is able to signpost and support me. That can do wonders. Sometimes it's the smallest things, it's not complex programmes.' Adviser

In custody, the benefits for clients included feeling more informed about different options open to them and what support services are available on release. Topics covered included volunteering, employment, further education and training, benefits and housing. Those taking part reported feeling more positive about the future as a result of the workshops, and had more confidence, motivation and focus. This was leading to more productive meetings with National Careers Service advisers. Many who took part in the project progressed to the work skills programme delivered by Weston College.

'I think some self-worth is what they got out of it. Believing that they're not just going to go out and be on benefits, in a one bed place doing nothing. There are options they could look at.' Adviser

The group approach also meant that those taking part developed their skills in working with others and could learn from each other's experiences:

'They all tended to support each other and through group discussions would identify each other's skills. I think that helped. For them to accept positive information as well because I think sometimes they're not so good at taking that on board. To share all those ideas and to accept other people's viewpoints.' Adviser

Advisers

All the advisers working on the project had found it an enjoyable experience and felt they had personally gained from being involved. They had developed their knowledge, understanding and skills in group delivery and also working with mid-life clients and focusing on issues pertinent to them. They had also learnt about different resources.

'I've developed knowledge of different resources that will be of benefit in the future and that we can share with the service... Some of those resources were out there any way but it's just about highlighting them sometimes.' Adviser

'Within teaching you're always learning and developing activities and it was really good to be able to do that. To have the autonomy.' Adviser

One adviser spoke of being shocked at the age discrimination that some customers have encountered:

'I've been surprised by some of the experiences people have had in terms of age discrimination. At the sheer blatant age discrimination that has gone on. For example somebody was told 'I'm making people redundant. I want a young team. You're going to go.' And that has shocked me.' Adviser

Several advisers also said that the focus of the project had encouraged them to consider their own options and personal development:

'Every session I delivered I came away thinking what I needed to do. Reflecting constantly on myself.' Adviser

Organisation

For Tribal, the pilot has demonstrated the value of MLCR workshops. It has also enabled them to grow their group work activity. The resources developed for the project have been shared with all National Careers Service advisers and utilised for staff development days. It is felt that the resources could now be tailored for use with

a range of client groups. The potential to offer mid-life review sessions to members of staff has also been flagged to the HR department.

'We've learnt from it, we're extrapolating good practice. It is something I think is an invaluable thing to be able to offer customers. And I don't just think for 45 plus. People get stuck in ruts at 30. They get tagged at 25 even. I think it's a great tool and opportunity to offer.' National Careers Service Manager

Funding has been secured from the ESF/National Offender Management Services (NOMS) to continue and extend the work in prisons. This activity is now underway.

Issues and challenges

The short timeframe for the project presented some difficulties, particularly around resourcing the work. Activity in the community was dependent on the use of existing members of staff. A longer project duration would have enabled more development time and also the chance to secure 'buy in' from key partners, which can take time:

'With more time you can build that ownership, belief that it's going to help their customers.' National Careers Service Manager

The main issue for the community strand of activity was clients not attending sessions they were booked on to. Some clients did cancel their booking in advance, but often at very short notice. Although this issue had been anticipated, it was greater than expected. There was also some drop-out of clients between the two workshops.

Advisers in both settings commented that there was a lot of material to cover in the time available. It was suggested that the amount of content should be reduced or alternatively the length or number of sessions increased. There was similar feedback from clients.

'Next time I would suggest it was run over 4 sessions. I felt at times we could have gone in to a lot more detail but we had to move on... I think for them [clients], having that breathing space in between.' Adviser

Critical success factors

- The most effective approach to engaging clients was through personal contact, either by the coaches themselves, other National Careers Service advisers or Job Centre staff: *'Going out and telling them what it's about and what they could achieve was actually where I got the buy in.'* Adviser
- The programme delivered was well received by clients. It enabled them to *'take the time out, sit down and psycho analyse themselves and come up with some very positive ways forward.'* Project Manager. The programme was reviewed and tweaked on an ongoing basis in light of client feedback.

- The learning environment – Small group sizes and effective warm up exercises helped to create a space where people felt comfortable and able to talk openly.
- Experienced coaches, skilled in group work and able to tailor sessions according to the needs of the group. The coach at HMP Leyhill has extensive experience of working with offenders. All coaches had a 1:1 induction and training with the Project Manager at the start of the pilot, and were in regular contact with the Project Manager and each other throughout the delivery phase.
- The combination of group work and 1:1 support was important. People had access to peer support through the group workshops. In the individual sessions they were able to get more personal support and discuss issues in private. One adviser noted how clients behaviour can vary, depending on the context: *'Amongst the group even those that came across as very confident, when you started having 1:1s they were very different.'* Adviser

Sustainability

The work is continuing in HMP Leyhill and also being introduced in other prisons in the region through financial support from ESF and NOMS. The programme content is largely the same; however the time allocation has been increased to two days (10 hours) and clients can now achieve a City and Guilds Level 2 Personal Development unit.

All National Careers Service advisers working in the community have been briefed on the project and the Blueprint for Careers to support their own development and that of their clients. The potential of the model has been highlighted through the pilot however the extent to which the work can be continued is dependent on resources.

MLCR case study: Workplace Learning Advocates

Background

Workplace Learning Advocates (WLAs) are employees in non-unionised companies who are trained to support and encourage formal and informal learning in the workplace. A key aspect of the role is working with individuals to assess need and provide signposting to relevant learning opportunities and support services. More than 450 employers in England have engaged with the initiative, which is managed and delivered by The Johnston Partnership and Work base Training.

The MLCR pilot project fitted well with the WLA remit. All WLAs are trained in information and advice skills.

'I could just see there were quite a lot of advocates who could benefit and staff in companies who could benefit. We know the companies quite well and get some of the profiles of their staff... we thought it would be a real benefit to them.' Project Manager

How it worked

Five WLAs volunteered to take part in the project, from a variety of companies across the country. Three WLAs based in the North of England were supported by The Johnston Partnership. Two WLAs based in Lincolnshire received support from Work base Training. Overall project management was provided by The Johnston Partnership.

The WLAs were given a small grant to support activity in their workplace, and each developed an action plan for the project. A minimum of eight clients took part in each workplace. Clients were engaged using a variety of approaches including email invites, posters, informal discussions with staff, information at team meetings and manager briefings.

At the start of the project, The Johnston Partnership developed a short questionnaire for mid-life employees. All the WLAs used the questionnaire to consult with their colleagues and find out about key topics of interest/ concern. Some WLAs held one-to-one meetings and used the questionnaire as a basis for discussion. The findings were then used to shape the mid-life career offer in each workplace.

The Rum Story is a small tourist attraction in Cumbria, employing around 20 staff. Thirteen staff took part in MLCR activities which included informal one-to-ones with the WLA, and group sessions on health and wellbeing, finances, careers and employment. The WLA also set up a resource library for colleagues and circulated information about useful resources.

Alex Smiles Ltd is a Waste recycling company in Sunderland. It has over 100 staff. Activities focused around health and finance. The WLA organised for a health bus to visit the company, providing health information and checks. A financial briefing was also delivered by Unionlearn which looked at how to budget, pensions and wills.

Voluntary Action Leeds provides support services and specialist advice to third sector organisations across Leeds. The WLA provided one to one support to colleagues on career development and pension issues and organised National Careers Service sessions for staff.

Lincolnshire Co-operative comprises a family of businesses. For this project, the WLA focused on employees in its Funeral Services. Individual interviews were conducted with employees. Health and well-being was identified as a key priority.

BG Futures is a business and enterprise hub at Bishop Grosseteste University, providing different levels of start-up support for new companies. The WLA provided one-to-one reviews for tenants and set up a group session on finance. Arrangements were put in place for tenants to access counselling and life coaching, and also peer support and mentoring.

Benefits and impact

Clients

Across the pilot, the benefits for clients have been wide-ranging. Clients have received expert advice and information on a variety of topics, for example, career development, pensions, work/life balance and personal health. They have accessed peer support and mentoring, and been signposted to useful resources and organisations such as the National Careers Service.

'A lot of us weren't aware of how costly some things can be and there are different routes to manage your finances. So what they would offer as an organisation, you can go there for advice, post you on to other agencies if needs be.' Client

'I certainly feel better having had a chat about things and knowing that others feel just the same.' Client

At one organisation, the project took place during a period of re-structuring. Some employees were facing redundancy. Staff valued the opportunity to attend a session on CV writing.

Some clients have found out about local learning opportunities and enrolled on to courses, or have been supported to use a computer. In some workplaces, clients have increased their health awareness and taken steps to become healthier:

'I have joined a gym and started exercise.' Client

Taking part in the project has provided clients with an opportunity to reflect and given them the confidence and motivation to make or review plans for the future.

'I thought about where I was going in regards to my financial future.' Client

'It stimulates action ... when you sit in a lunch time session and you allocate some time to it and you've got someone's business card then you do; you make the phone call, put it in the diary and you get the ball rolling.' Client

In some workplaces, employees have become more aware of the support provided by their WLA.

One client had suffered a major fracture to her lower leg about 10 years ago. She has arthritis of the ankle joint. Eager to maintain a reasonable level of health and fitness, she is keen to take up any support available:

'If it's offered to me I will try and take it up. I want to work. I don't want to be sitting in the house with my leg up.'

After attending only a couple of sessions set up through the project, this client is experiencing health benefits. She is following the advice of specialists who have delivered the sessions and is employing different exercises and techniques she has learnt about.

'I feel that I am able to be more mobile and flexible and have a better knowledge of my condition. This in turn has given me more confidence in my performance at work; this has also been transferred to family life. What is really important is that I can recognise when I need support and that I am not letting the company down if I ask for it. They have been very supportive.'

She is keen for the well-being sessions to continue in her workplace and would particularly welcome some individual support.

'I think it's brilliant what [WLA] is doing. She's keeping me going at work.'

Workplace Learning Advocates

Most of the WLAs taking part in the pilot are in mid-life themselves. The project was of personal interest to them and they also gained from some of the activities they set up for their colleagues. Two WLAs completed a MLCR session with The Johnston Partnership which enabled them to look at their own situation and explore different options.

'I involved myself as part of this. I needed somebody who could provide the support and the resources for me.' WLA

For the WLAs, the remit of the project complemented their existing role and developed it. Through the project they gained more knowledge about local sources of information and support, learnt about free resources they could access and benefitted from on-going support from The Johnston Partnership and Work base. They also strengthened their links with colleagues and gained a better insight into their needs and interests.

'What it's made me see is you can't clump older workers all in one group. It's a group of older workers who are all individuals. They all have similar issues'

that they have concerns about and you can do group workshops... but within that they all have individual issues that need to be addressed on an individual basis.' WLA

'This was an incredibly useful exercise for all involved. I feel much closer to each interviewee as they shared some very personal insight.' WLA

'There's actually a vast array of free things out there which came as quite a surprise to me.' WLA

Information about the project including the employee questionnaire and resources list has been shared with the wider WLA network electronically and at network meetings. There is also an on-line course for WLAs which provides details about the pilot.

Employers

All five companies participating in the pilot reported positive outcomes for the organisation. The project has enabled them to gain a more detailed understanding of the needs, interests and aspirations of their employees at mid-life. One company has become more aware of the demographic profile of its workforce.

'The project has enabled us to engage more with our staff... and gave us data on the demography of our staff along with feedback on the health & wellbeing work we were already doing... We have always taken pride in the fact that we look after our staff. This project has prompted us to ask the staff what their needs are and tailor the activities accordingly.' Employer

Through the project, companies have been able to review and develop current working practices and policies, provide support to staff on different issues (for example, pensions and IT), find out about free support that can be offered to staff, make improvements to the working environment and identify priorities for consideration and action. All companies plan to embed the work in some way.

'It's made us as an organisation look at our working policies regarding older employees... In addition we're going to implement the review in the annual appraisal system.' WLA

'It allowed companies to explore other issues... They set off just thinking they'd be talking to people who were a bit older in the workplace and needed support but it's spun off in to all kinds of other areas. Maybe we need to think about what happens if there's a redundancy, maybe we need to think about having a health and wellbeing policy, maybe we need to start analysing our workforce.' Project Manager

Several employers noted that their employees felt valued and supported by the company because they were being consulted and encouraged to take part in

review activities. This increases their confidence and motivation which brings business benefits. For companies who already had systems in place for engaging with staff, the project confirmed the importance of this for boosting staff morale, productivity and loyalty.

'It's given us focus to address how we can support an older workforce. We've had staff who've been with us for a long time... so we must be doing something right. But we want to make sure that continues. Older people bring so many benefits to an organisation. It's the experience. There's just so much they bring. But if they don't feel valued or supported then we'll lose them.'
WLA

One company noted that evidence from the project will support applications for several awards, including one on providing a healthy workplace.

WLA initiative

For the Johnston Partnership and Work base Training, a key benefit has been finding out about existing resources which can support WLAs in their role. It also supported them to work with WLAs on a one-to-one basis:

'I've learnt about a lot of resources that are available... Being able to gather a bit more information about who is out there and would be willing to come in and run free sessions.' Project Manager

'It's given me even more insight and perhaps different ways of supporting companies. Some of the needs they have.' Project Manager

Issues and challenges

Some companies have been able to achieve more in the project timeframe than others. In some workplaces, it took longer for plans to get underway due to staff capacity issues. For one company, the project took place during one of their busiest periods. Pressures on time affected WLAs and clients too. One WLA found it difficult to recruit staff to some activities due to high workloads.

Other challenges included sourcing the expertise of a finance advice worker within a limited budget, finding good quality learning opportunities for clients at an affordable price and setting up activities at a convenient time for clients when work patterns vary across the organisation.

A tension between the informal nature of support provided by WLAs and the monitoring requirements of the project was also noted.

Critical success factors

- Management 'buy in' is critical: *'The key thing seems to be if you can get managers on board with it.'* (Project Manager)
- Interest and commitment of the WLA.

- Initial and ongoing support from The Johnston Partnership/ Work base Training: *'Their input helped keep me focused... They contacted me almost on a weekly basis.'* (WLA)
- Funding: this supported the activity of the WLAs and also enabled the one-to-one support from The Johnston Partnership and Work base Training.

Sustainability

The five companies involved in the pilot are intending to continue the MLCR work in some way. Some companies have planned further workshops, for example, healthy eating, stress management and careers advice. In one company, individual support is now being organised following on from the group session activities. This will be funded by the company. Some WLAs will embed the reviews into their existing role, drawing on the tools and resources developed through the project. Several companies are considering incorporating the review into annual appraisals for all staff.

The WLA initiative is exploring options for sharing lessons learnt across the WLA network. The approach taken will be dependent on available resource.

Appendix F: Further findings from MLCR Client Follow-up Survey

In total, 161 responses were received to the Client Follow-up Survey, giving a response rate of nearly ten per cent of those approached. However, since this represents a small proportion of those who undertook a review, the results must be treated with some care and detailed analysis was not possible.

Respondents

In general, the respondents to the survey were representative of the population of MLCR clients. The only identifiable difference was their gender: 55 per cent of respondents, but only 47 per cent of clients overall, were women.

As with the client population, the majority of survey respondents were aged between 45 and 64 years old, and concentrated between 50 and 59 years old. This group form only 19 per cent of the English population aged 40-65, as against 33 per cent of the clients. For comparison, 24 per cent of National Career Service clients are aged over 50 years old (varying from 19 to 30 per cent by region).

Eighty-three per cent of survey respondents were White British, compared with 87 per cent of the client population. This broadly matches the ethnicity profile of the 45-65 population as a whole, and of National Careers Service clients²⁶. Survey respondents were also much more likely to be engaged in learning at the time of their MLCR than clients in general (41 per cent against 19 per cent).

Findings

Previous experience of information, advice and guidance

Survey respondents were asked when they last received advice about their job or career. As Figure 18 below shows, over a third of respondents had not received advice since they left school. Of those who had received advice since leaving school, 20 per cent had received this from their employer and 70 per cent had received this from another organisation (the remaining 10 per cent could not remember who they had received advice from).

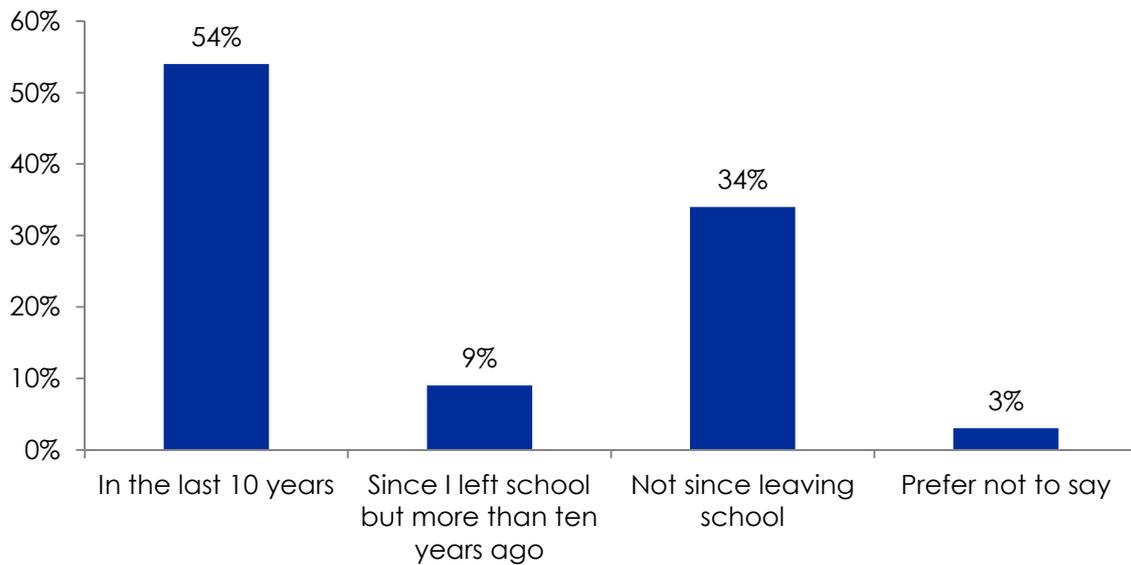
Perception of skill needs

Respondents were also asked whether they felt their skills and knowledge match their current or most recent job. This is a question asked in the Workforce Employee Relations Survey (WERS), where 52 per cent say they are overqualified for their current job, and 44 per cent say their skills are adequate²⁷. As Figure 19 below shows, MLCR respondents were significantly less likely to feel over qualified, and twice as likely to feel under qualified.

²⁶ All National Careers Service data are taken from the latest Annual Report. BIS (2014) National Careers Service Satisfaction and Progression Surveys: Annual report (April 2013-March 2014 fieldwork).

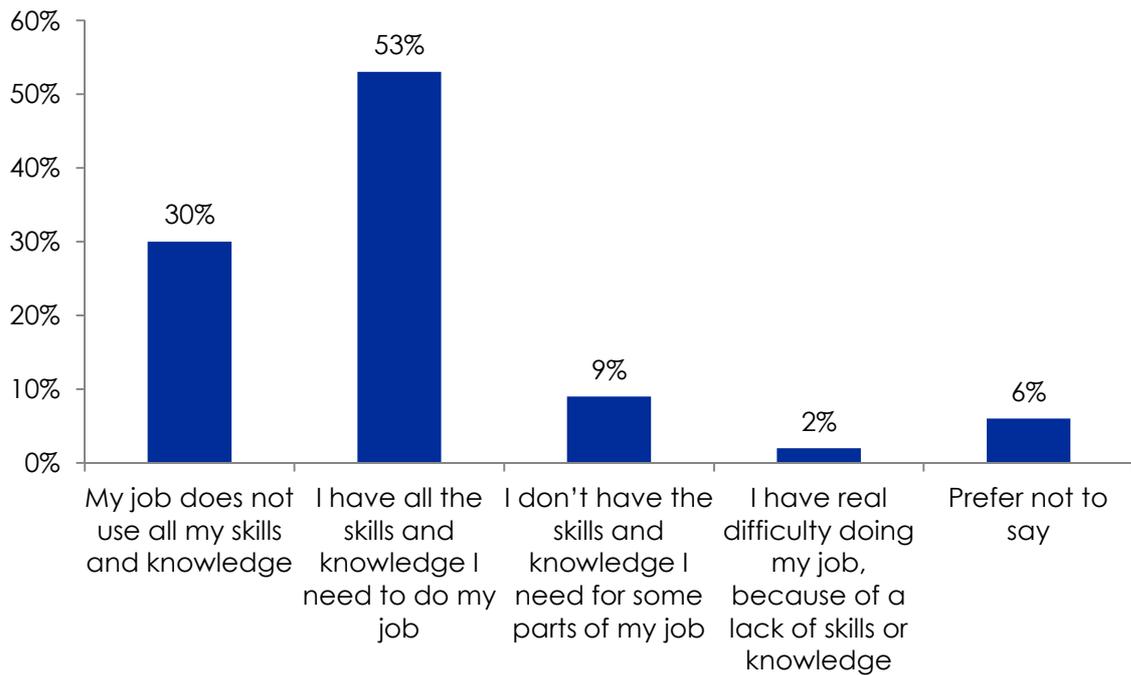
²⁷ Van Wanrooy B. et al (2013) Workforce Employment Relations Study: first findings. BIS London (www.wers2011.info)

Figure 18: When survey respondents last received advice about their career



Base: all respondents who gave an answer = 156

Figure 19: Extent to which skills and knowledge matched current or most recent job



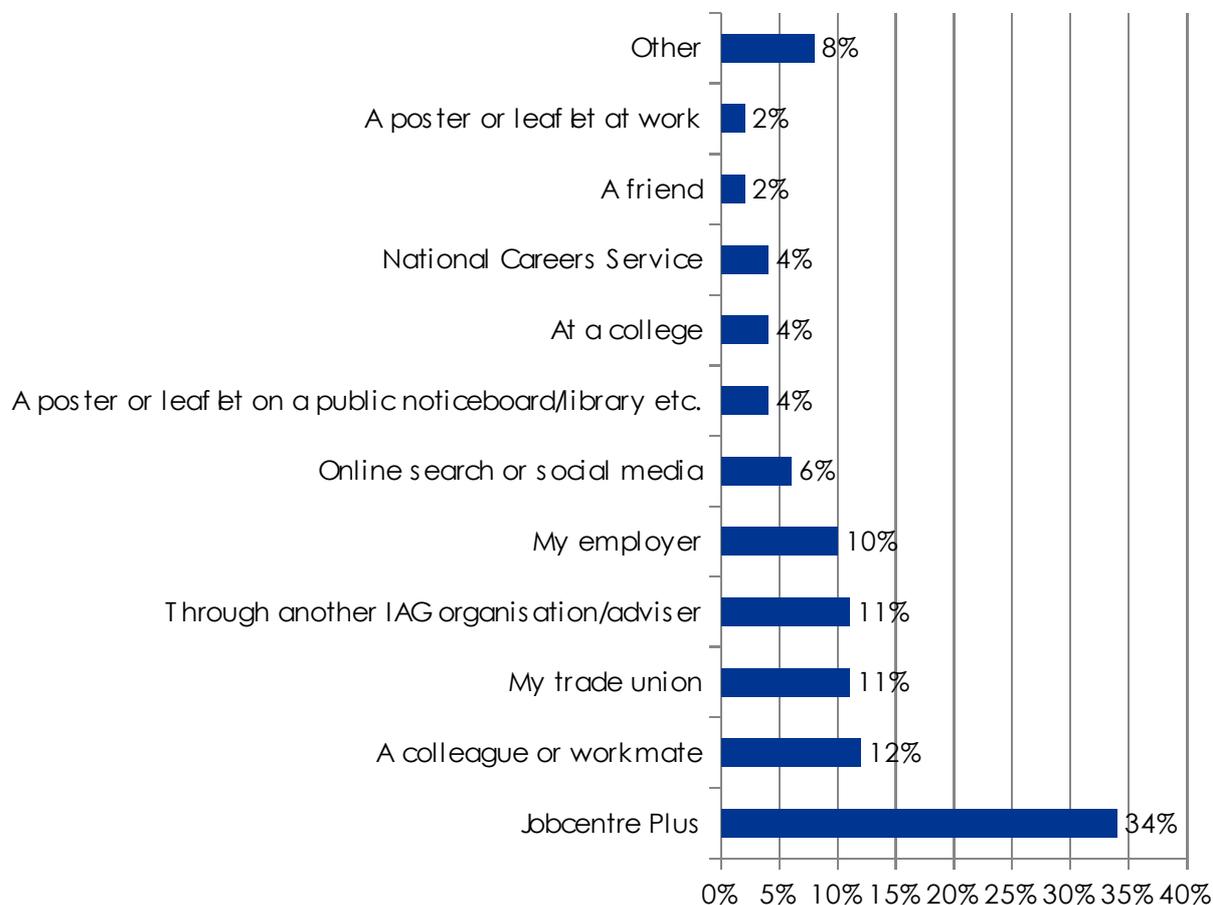
Base: all respondents who gave an answer = 152

[Awareness of Mid-life Career Review](#)

Over a third of respondents heard about the MLCR through Jobcentre Plus (see Figure 20 below). This shows the importance of JCP advisers being aware of any MLCR offer and ensuring that this is available on their local supplier network. Other

common sources of information about the MLCR included colleagues or workmates; trade unions; other IAG organisations/advisers; and employers.

Figure 20: How respondents heard about the MLCR



Base: all respondents = 161

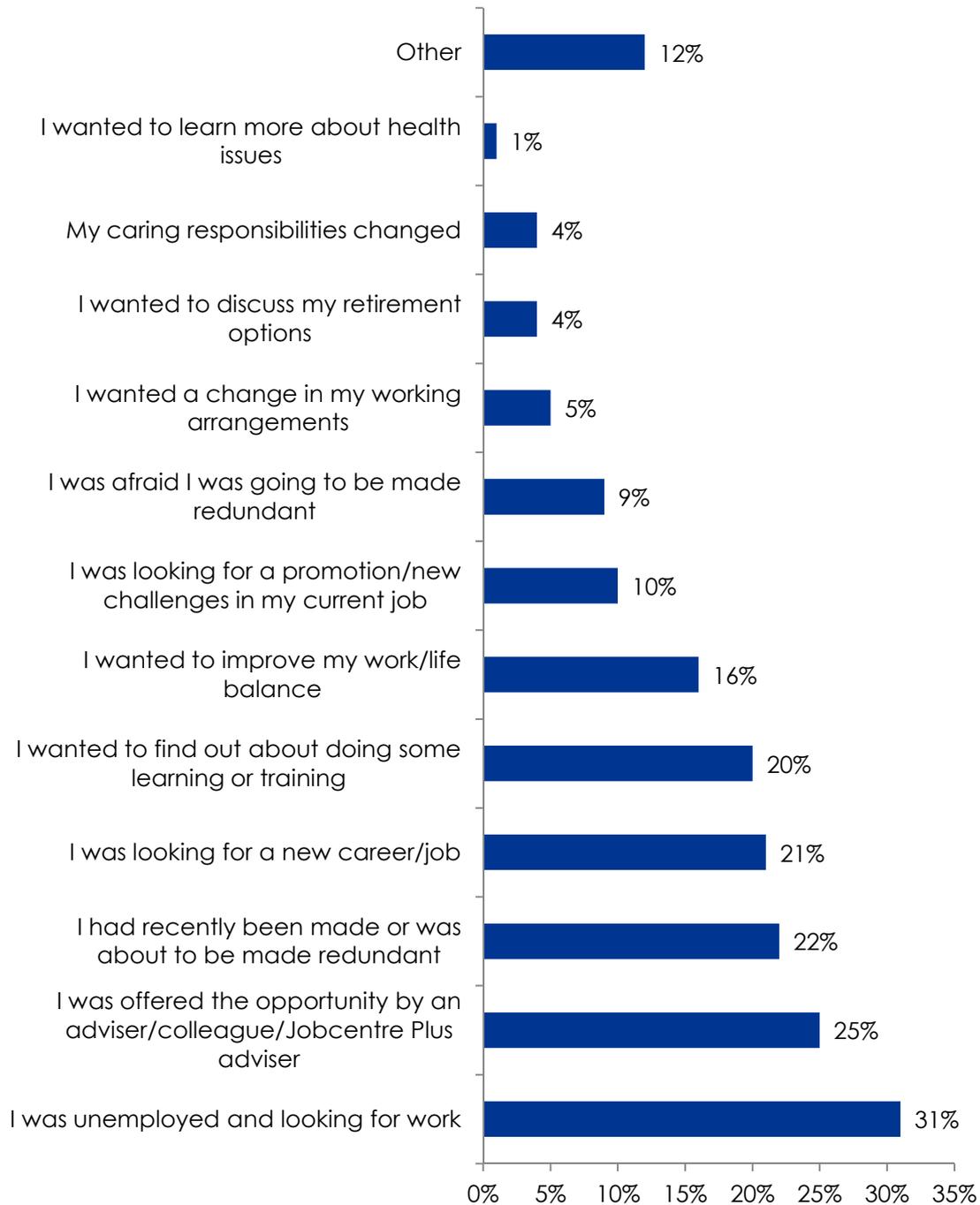
Note: respondents could select more than one answer

Motivation for having a review

Figure 21 below shows respondents' reasons for having a MLCR. It is important to distinguish the primary reasons for seeking a review, from the issues actually discussed. Thus, only 1 per cent of respondents cited health issues as a reason for seeking a Review, but 17 per cent discussed this during the Review itself

Given the high proportion of respondents who heard about the offer through Jobcentre Plus, it is unsurprisingly that respondents' main reason for taking up the offer was because they were unemployed and looking for work. Just over a fifth of respondents were looking for a new career or job, or wanted to find out about doing some learning or training. Respondents were least likely to engage with the MLCR because they wanted to learn more about health issues; they had experienced a change in their caring responsibilities or they wanted to discuss their retirement options.

Figure 21: Respondents' reasons for having a MLCR



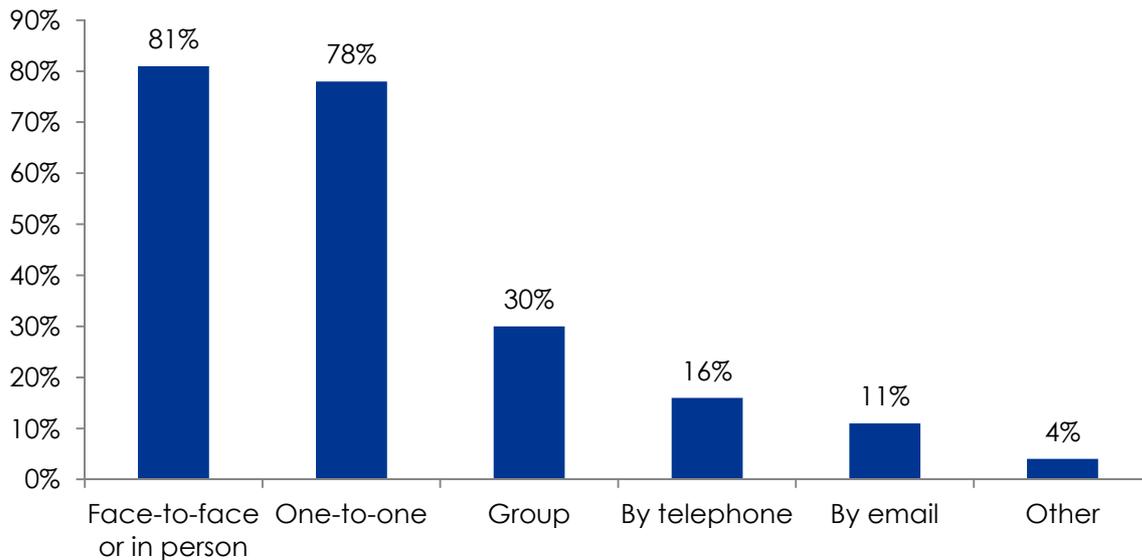
Base: all respondents = 161

Note: respondents could select more than one answer

Experience of the Review

Figure 22 below shows that respondents were most likely to have had a face-to-face, one-to-one session.

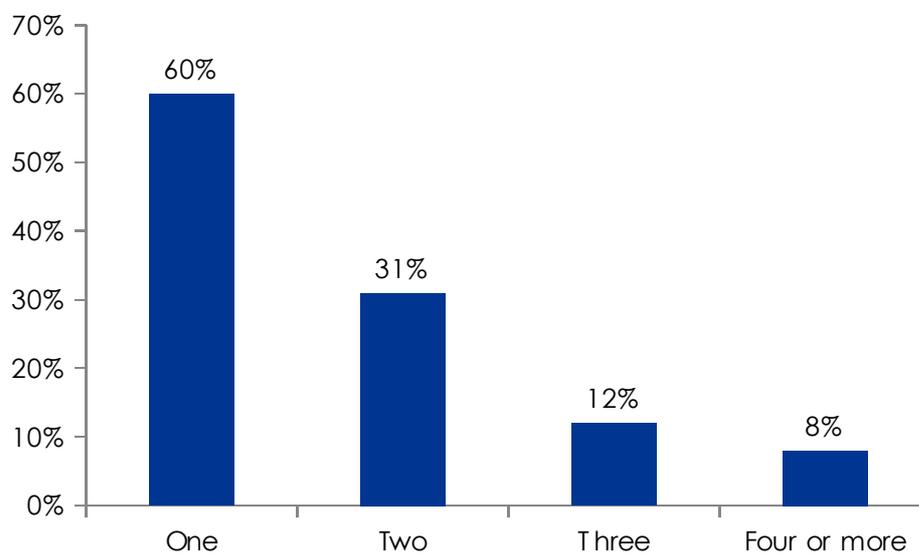
Figure 22: How respondents' MLCR sessions were delivered



Base: all respondents = 161 Note: respondents could select more than one answer

As Figure 23 below shows, respondents were most likely to have only had one MLCR session, which is very similar to the figure for National Careers Service clients. However, eight per cent of respondents had had four or more MLCR sessions. The National Careers Service data shows that face to face clients receiving multiple sessions were more likely to be satisfied with the service than those receiving single sessions (especially if later sessions were with the same adviser).

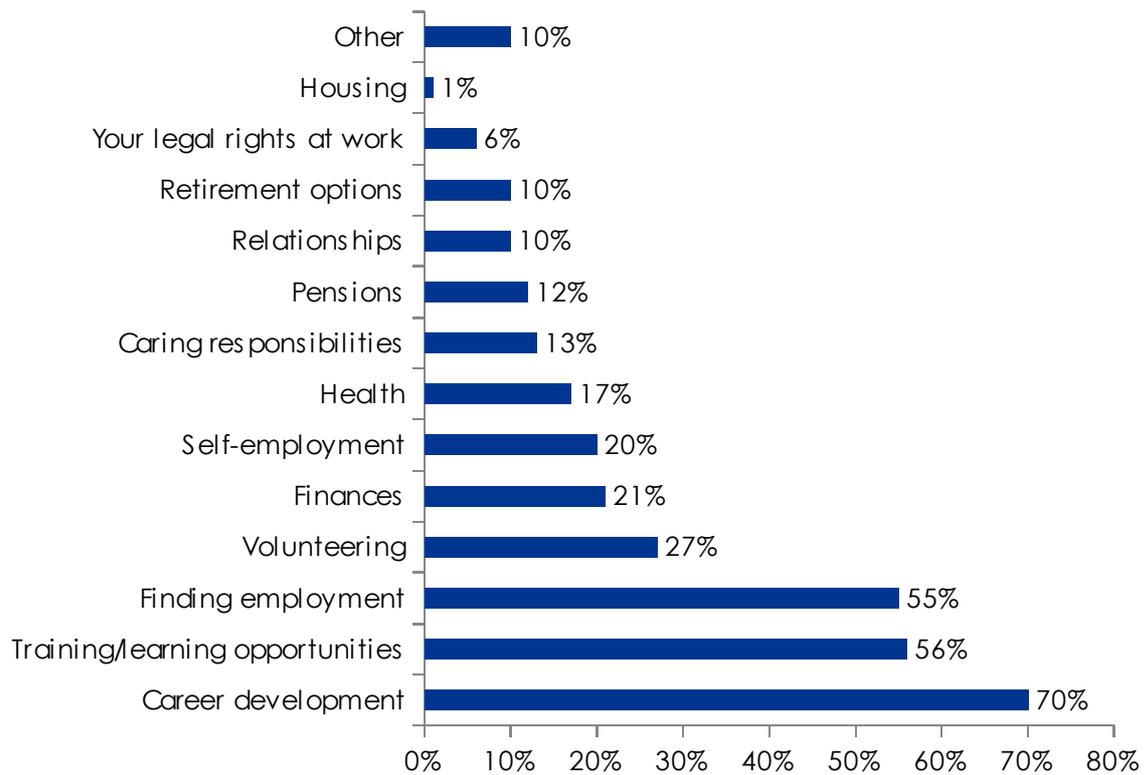
Figure 23: Number of MLCR sessions



Base: all respondents = 161

By far the most common topic which respondents discussed in their MLCR sessions was career development (see Figure 24), which is a very broad concept. Over half of respondents also discussed training or learning opportunities and finding employment. Respondents were least likely to report discussing housing or their legal rights at work with their adviser.

Figure 24: Topics covered in respondents' MLCR sessions



Base: all respondents = 161

Note: respondents could select more than one answer

Work related outcomes of the Review

As Figure 25 below shows, 81 per cent of survey respondents identified multiple positive outcomes from the Review. The most often cited are relatively “soft” qualities, with over half reporting that they felt more confident in their own skills and experience, and more than 40 per cent saying that they knew more about possible work or career opportunities.

Conclusions

This Client Follow up Survey experienced unavoidable technical difficulties which significantly reduced the response rate. Nevertheless, since the respondents were broadly matched with the overall client population, and were concentrated largely in the 50-60 age range which the MLCR had targeted, the findings can be seen indicative of the outcomes of MLCR.

Figure 25: Outcomes respondents had experienced as a result of their MLCR



Base: all respondents = 161

Note: respondents could select more than one answer

