



Evaluation Report 2017

Supporting Mid-life
Development Survey

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Executive summary

The rapidly changing face of society has led to the first ever **'5 generational work force'**. Changes to pensionable age and shifting demographics means for the first time people aged between 18–70+ are working closely together in organisations with different expectations, skills, aspirations and ways of working. Combining the life skills of older workers with the digital skills of the younger generation to ensure successful organisations will pose challenges to HR departments and recruitment and retention policies over the next 20 years.

The concept of a 'job for life' and working for the same organisation throughout life is no longer relevant to many people. It is believed that individuals on average will change jobs 6 times during their working life.

In response to this agenda, the government funded unionlearn Mid-Life Career Review Project ran from 2013–2014 across 15 unions placing union learning representatives at the heart of supporting individuals to think about their options in mid-life (defined as aged 50+).

Following the Mid-life Career Review project unionlearn continued to disseminate, train and encourage trade unionists to engage with the mid-life development agenda. This work resulted in over 5,000 people undertaking mid-life and older workers activities and a wide range of materials and resources being developed to help support this work.

As a recent EU report heralded:

'Particular mention is made in the UK case study of the work of unionlearn, which delivered MCRs (Mid-life Career reviews) to 700 individual union members, considerably overshooting its target of 400 clients. ULRs explored novel ways of appealing to members and interesting them in the idea of a MCR, using effective awareness-raising and campaigning approaches'¹

Two years on from the pilot, in September 2016, unionlearn commissioned a short survey of over 2,500 individuals, organisations and unions to see what progress and impact had been made since the project funding ended. The survey also aimed to evaluate the use of the unionlearn Mid-life Development Review resources that had been developed as part of the pilot project.

The survey shows that the mid-life review process had developed over time to become a more holistic tool providing the **'Entry Point'** to the discussion of a host of related issues such as English, maths and digital skills support needs, pensions and financial advice, health and well-being, transition into retirement and supporting redundancy situations and building resilience to help older workers remain in the labour market.

The need for mid-life reviews and the importance of **'self-identification'** at whatever age has emerged as a theme. The support that is on offer is relevant to the entire workforce. Also, the survey confirmed that 'older workers' are not a homogeneous group. Bespoke and flexible approaches are needed to support the diverse range of people who could benefit from a mid-life development review. A **Menu of Interventions** is needed to allow for flexible responses for a wide range of individuals and ages.

Employer engagement in terms of unions and union reps working closely with managers and HR/training professionals has also proved an important theme in ensuring successful mid-life development reviews in organisations. Attaching the reviews to other agendas such as skills development, contributing to organisational change and supporting the professional development review (PDR) processes has been shown to be invaluable in ensuring the sustainability of the reviews over time.

The quality and range of unionlearn resources and 'signposting materials' has helped to ensure the issue remains high on union and company agendas and it is important that the focus doesn't move onto other initiatives. On-going assessment of the contribution of the mid-life development review process to the discussion on flexible working for an age diverse workforce and changing attitudes and corporate behaviour will prove to be the most significant issue going forward.

The role of unions in this process has never been more important. Unionlearn will continue to support trade unions to embed mid-life development reviews into their learning and skills work within the context of all-age, intergenerational approaches to supporting learners.

¹ Eurofound (2016) changing places Mid- career Review and internal mobility Publications Office of the European Union, Luxembourg

1. Introduction

Society is growing older and people are living healthier and longer lives. The average age of retirement is now 64.7 for men and 63.1 for women (ONS). The concept of sequential life stages has been replaced by many different life roles some of which need to be carried out at the same time such as caring responsibilities and paid work. The average worker will work 6 different jobs at 6 different companies and possibly face 2 redundancy situations during their working life.²

A recent publication by The Age of No Retirement³ found that 83 per cent of Brits feel they are not like others in their age group, while a growing number of women are taking time out of the workplace later in their careers to support secondary school-age children – a kind of mid-life maternity leave. Many men in lower skilled but higher paid roles are finding that traditional jobs are disappearing and are being compelled to consider lower paid, more insecure jobs.

At work, the old model of jobs for life followed by retirement no longer exists, and changes to the pensionable age requires more people to work for much longer than they had originally planned.

The recent 'Attitudes to Working in Later Life: British Social Attitudes 2015'⁴ survey key findings show:

- Nearly two thirds of employees say they expect to retire in their 60s, and 17% expect to retire in their 70s.
- Those in younger age groups were more likely to say they expect to retire in their 70s (37% of 18–24s and 21% of 25–34s).
- Of those already retired, 39% said they did so because they wanted to; 20% said they retired due to ill health.

Demographics in society and reflected in the workplace pose challenges for employers as to how they can better support older workers with technological advances and skills development challenges. 46% of UK employees will at some point completely change their career.⁵

The Government predicts that, by 2022, there will be 700,000 fewer people aged between 16 and 49 in the UK, compared with 3.7 million more people between the age of 50 and state pension age. Also, by 2020 over 50s will comprise almost one third of the working age population.⁶ Currently there are more over 50s in employment than ever before and the employment rate of older people is still rising.

This means that organisations need to attract and retain young workers in an increasingly employee favourable market. They also need to retain older skilled employees.

A recent EU report into mid-career reviews states:

'People need to work longer – and frequently would like to work longer. However, the type of work people are doing may not be suitable for older workers; in addition, their skills may no longer be in demand. To effectively extend working lives, the future needs of middle-aged workers need to be anticipated, with reflection starting well before workers' choices become limited and change is no longer feasible. The issue is particularly important for those engaged in arduous work.'⁷

This view is supported by a recent CIPD Personnel Management article⁸ published December 2016 which argues that you cannot just take age as the identifying feature in what people want to gain from their work, you need to also take into account different working styles and preferences. In order to do this a structured but flexible approach to any review-led process is required.

² IPD People Management December 2016 – 'The Lowdown on Age'

³ Research Report – The Age of No Retirement 'Age does not define us'

⁴ DWP Attitudes to Working in Later Life: British Social Attitudes 2015 (Published December 2016)

⁵ CIPD People Management Ibid

⁶ DWP Publication Fuller working lives – A Framework for Action 2014

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/458861/fuller-working-lives.pdf

⁷ Eurofound (2016) changing places Mid- career Review and internal mobility Publications Office of the European Union, Luxembourg

⁸ CIPD People Management – 'Rethinking Age at Work' Jo Farager – December 2016



Unions are better placed than most other agencies to support individuals through their unique network of active ULRs in the workplace.



There are many different kinds of review processes led by employers, independent guidance personnel and trade unions. Who takes the lead will affect the scope, perspective and objectivity of reviews and inevitably lead to different outcomes for individuals.

The European perspective argues that it is best to undertake reviews together with partners:

MCRs should be done in companies and organised by companies, although carrying out an MCR is best left to a partner such as a trade union representative or an external provider. This helps to overcome the trust issue between employers and employees.⁹

1.1 Background

In 2013 unionlearn, in conjunction with The National Institute for Adult and Continuing Education (NIACE) now the Learning and Work Institute England, developed and piloted a government funded mid-life career review process.

The project was developed in response to the absence of targeted support for older job seekers and that older people who lose their jobs are more likely to struggle to return to work. It also supported government policy at the time which supported retaining older people in jobs and extending working lives due to populations ageing.

The project finished in March 2014 and tested and evaluated different models for review and supported the development of specialised resources. Unionlearn was a key partner in the project and published an evaluation report¹⁰ in June 2014, which made a number of statements relating to the sustainability of union-supported mid-life reviews in the workplace:

- supporting mid-life development will be a central feature of the unionlearn strategy up to 2017 to ensure momentum is not lost
- mid-life development reviews sit alongside other important agendas such as health and wellbeing and active ageing
- unions should campaign for working people to have a right to mid-life development reviews
- mid-life development reviews should become a natural and routine process, like dental or health check ups
- support trade unions to embed mid-life development reviews into their learning and skills work within the context of all-age, intergenerational approaches to supporting learners at work
- continue to promote the unique value of the ULR as a trusted intermediary in the workplace
- continue to promote the message 'It's never too late to make a change or take up new opportunities'

1.2 The unionlearn Mid-life Development Review survey September 2016

It therefore seemed timely to do a 'stock check' of how the initiatives have fared in workplaces across England post the project and assess the sustainability of the model over the past 2 years.

Against the backdrop of these commitments and challenges, unionlearn carried out a survey, during autumn 2016 into mid-life development reviews and older workers to assess how unions were continuing to take forward this important agenda. Evaluation and feedback from the 2013/14 government funded pilots which had taken place across 15 unions had indicated that unions are better placed than most other agencies to support individuals through their unique network of active ULRs in the workplace.

⁹ Eurofound (2016) changing places Mid- career Review and internal mobility Publications Office of the European Union, Luxembourg

¹⁰ Unionlearn 'Mid-life career reviews – Helping Older workers to plan their future – Evaluation Report June 2014 – page 30
www.unionlearn.org.uk/publications/midlife-career-reviews-helping-older-workers-plan-their-future-evaluation-report

The unionlearn model that was developed as part of the pilots proved to be fit for purpose and flexible and responsive to changing agendas. It was cost-effective and developed to be sustainable with a menu of activities supported by specialised resources. However, the challenge to unions was keeping the momentum of this initiative when funding was no longer available and when demands and changes across workplaces continue to prove challenging for many people. It is against this backdrop that the 2016 survey was carried out.

The Survey was sent to 2,500 contacts in September 2016 and focused on measuring the impact and assessing the progress of the on-going mid-life development review activities being supported by union learning representatives. The survey also evaluated the uptake and use of the specialised resources developed and the key issues identified going forward.

2. Supporting Mid-life Development survey

2.1 Profile of respondents

261 responses were received, which comprised members from 30 named unions. 3 unions PCS (75), Unison (52) and Unite (38) comprised the majority of respondents.

Against this backdrop the largest number of respondents were either union learning representatives (ULR 55%) or a member of a trade union (37%). As would be expected 57% of respondents were between the ages of 50 and 59 but with a useful number of under 40 (15 individuals) and 5 individuals over 70.

Table 1

Sector response	Number
School/university/college/training provider	11
Large charities	3
Financial services	5
NHS trusts	23
Local authorities	37
Unions	19
Private sector companies	32
Small charities	4
Government agencies/civil service	14
Police force	2
Prison service	4
Fire and rescue	3
HMRC	25
DWP	20
Retired	4
Freelance/self-employed	4
Retail	2
Miscellaneous – solicitors/church	2
No answer	47

2.1.1 Cross sector responses

There was a good mix of responses from both public and private sector organisations with multiple responses from some organisations such as HMRC/DWP.

2.1.2 Job insecurity and the importance of mid-life development reviews

The government report *Fuller Lives*¹¹ explores the issue of early or unplanned exit from the labour force:

- early labour market exit is still a problem, with around 2.9 million people currently out of work aged between 50 and State Pension age
- over half of men and women have already stopped working before they reach State Pension age
- 1 in 6 men and 1 in 4 women who had recently reached State Pension age hadn't worked since at least age 55.

This document investigates the main causes of an unplanned early exit from the labour force, including health problems, disabilities, caring responsibilities, and redundancy. It also sets out why large numbers of people leaving work significantly before State Pension age can have serious consequences:

- for the financial security of individuals involved, their wellbeing and health
- for the public finances, and wider economy
- for employers, who can lose valuable skills and experience.

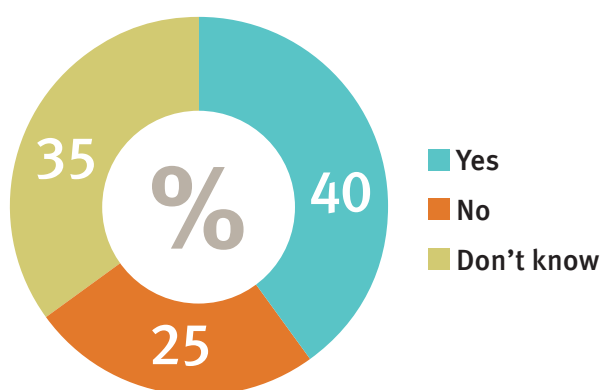
From previous unionlearn reports the issue of job insecurity is always the top concern of workers:

'For working people, prevention of drop-out from the labour market is crucial, since if jobs are lost, the chances of returning to work after 55 are very low... Early intervention may prevent people from leaving the labour market prematurely.'¹²

¹¹ DWP Publication Fuller working lives – A Framework for Action 2014

¹² Unionlearn 'Mid-life career reviews – Helping Older workers to plan their future – Evaluation Report June 2014

This concern was echoed in the 2016 unionlearn survey. Individuals were asked if they thought they would stay in their current occupation until retirement their response was:



The 40% of people who answered 'yes' was higher than expected considering the sectors outlined in Table 1 and the 35% of people who answered 'don't know' could reflect the high levels of uncertainty for many individuals who just do not know what the future may hold for them.

2.2 Unionlearn model of mid-life development review

The unionlearn model provides a flexible menu of activities in three stages from which ULRs can select components and resources to suit their workplaces. It puts the union learning representative (ULR) or other union reps at the heart of the review process and takes the whole person into account.

2.2.1 Employer engagement

The Model promotes partnership working both with the employer and with other specialist agencies.

'A mid-life development review process can contribute to and provide a focus for those interventions, and is particularly valuable if unions, employers and specialist agencies work together' ¹³

The mid-life development review – a three stage modal

Stage 1

Preparation

- briefing and resources from Unionlearn and the National Careers Service
- building the infrastructure in the workplace
- getting employers on board
- getting people in the workplace to come forward
- using pre-review questionnaires
- making a networking directory for information and referrals
- registering on the union learning Climbing Frame.



Stage 2

One-to-one or group work

- listening and exploring
- overcoming issues and barriers
- identifying transferable skills
- finding information
- getting specialist support
- action planning.



Stage 3

Follow-up and ongoing support

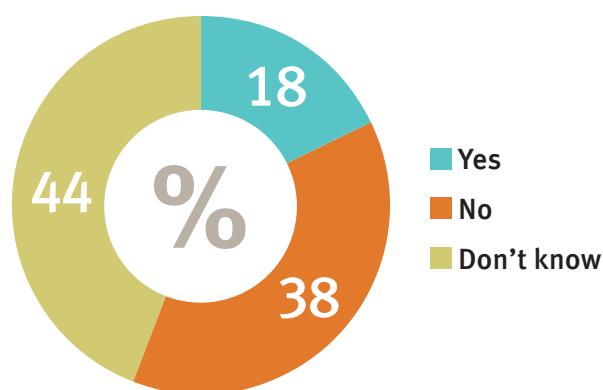
- individual support
- reviewing action plans
- celebrating achievement
- mentoring and coaching
- making the case to employers.

¹³ Ibid

The *Helping Older Workers Plan Their Future* evaluation report summarised the benefits of mid-life development review processes to employers:

- staff are more motivated to stay and take up training offers and new opportunities at work
- staff can develop new skills, knowledge and experience to benefit the organisation
- staff can provide mentoring and pass on their skills and experience to other staff
- knowledge transfer within the organisation is made easier
- reduced staff turnover, recruitment and training costs can result
- the organisation can develop and grow its own talent and management
- the organisation can develop new policies and procedures to help older workers to reach their full potential, and effective strategies for managing succession

The 2016 survey sought to find out if employer engagement has continued since the pilots. When asked if employers had been involved in the reviews the following responses were given with reasons summarised:



Although the percentage of 'yes' answers is seemingly low it is not unexpected. Mid-life reviews are not high on the priority list for many employers and where unions are seen to drive forward the agenda, many organisations are confident in what unions are offering and leave it to them to lead on activities. Also, where union learning funded (ULF) projects support the delivery of this agenda, employer engagement is high and positive outcomes achieved.

Table 2

Reason	Number
Not interested/employer was not involved	30
I didn't know about the review	17
Don't know the answer to this question	27
No time given	1
Need more support from the union	1
Used cards	2
Need training	1
Employer has other priorities	8
Good engagement	3

It could also be argued that even when the employer has not engaged it may be because they (whether via training offers or HR departments) have confidence in the union learning rep to deliver on their behalf via workplace steering groups who liaised with management as evidenced by HMRC/PCS reps who participated in the pilot project 2013/14.

Where there has been active engagement from the employer the following staff had provided support.

Table 3

Senior manager or CEO	19%
Line manager	22%
HR department	22%
Training manager	20%
Other	59%

Age UK is a great example of how senior managers across an organisation have embedded mid-life development reviews into a wider initiative to support work/life balance across the workforce and support older staff to transition smoothly into retirement:

Age UK – an organisational approach to mid-life development reviews

Claire Ball is the Diversity and Inclusion Manager at Age UK the country's largest charity dedicated to helping everyone make the most of later life.

As part of a wider initiative, 'Extending Working Life and Transition towards Retirement', Claire has been using the 'Mid-life Career Review' resources to support externally facilitated sessions in London and Devon for the Age UK workforce. Approximately 70% of Age UK workforce are over 50 years of age and Claire feels strongly that her organisation should be trailblazing this agenda *'It clearly links to the mission statement of Age UK and we are committed to supporting our own workforce to achieve a work/life balance and transition smoothly into retirement.'*

Claire is a member of UNITE and has been working closely with the Equalities Reps to take forward her ideas and make them a success. She understands the importance of ensuring management buy-in to the project to ensure a holistic and sustainable approach across the organisation. Claire said: *'I see mid-life reviews as the entry point to engage people in discussing other important agendas such as health and well-being, pension planning and their wider aspirations'*

When asked to summarise the key successes to date Claire said it was important to appreciate that **not one solution works for all staff** – *'For those colleagues that are already 'in the zone', ie the right frame of mind, it works well for them and they find it really useful to reflect on their working life issues and what it means to them personally to have a decent later life'*

Claire is keen to ensure that individuals choose when the time is right for them to engage – *'We advocate a 'self-identification' approach for colleagues to say when they think a session would be helpful and of interest to them'*. Even with this bespoke and 'hands-off' approach it's interesting to note that some colleagues still found it difficult to accept the aging process as a positive thing.

So even when organisations that are dedicated to working with people facing mid-life career choices struggle to get their staff to engage, it's even more important for unions to work with management to support this agenda.

Claire has solutions going forward – *'we need a menu of interventions for all ages linked to personal life planning and embed this into the developmental review process so it's not seen as a one-off intervention'*

Claire feels strongly that we need more **signposting** resources to support pensions and wider financial planning and is currently investigating how the **National Careers Service** could support individual staff and the wider workforce planning processes.

Claire continued *'I see this links very firmly into the flexible working discussions that are on-going across our organisation and we are developing a training module for managers on how to support an age diverse workforce and their teams. We need to challenge assumptions and utilise peer influence to change the culture and provide space and forums for staff to talk about this important issue.'*

So, what to the future? Age UK is moving into the third year of their 'Extending Working Life and Transition towards Retirement' initiative and Claire is working on a re-launch in January 2017 with a new resource pack to support. She said

'Age UK needs to continue with this agenda, some organisations lack the stamina to stick with it and move from one initiative to another. We need to focus on the softer side of the organisational development agenda in terms of how we change attitudes and corporate behaviour. We also need to assess the internal impact that the initiative is having and link our future plans to our developing 2020 vision'

Claire concludes – *'the profile of our staff affects our reputation and the demographics of our own workforce needs to change. I want to continue to work with unionlearn and would be delighted if they could come and speak to my staff about the Mid-life Career Review model and this important issue'*

Other employers represented in the survey had provided support in numerous ways:

Table 4

Facility time for reps	29%
Time for staff to attend activities	26%
Room/equipment	20%
Joint work to identify learning and training needs	12%
Review led into the workplace appraisal/development review	7%
Review helped people under the threat of redundancy	6%
Training opportunities were made available following the activity	5%
Training and HR policies were reviewed	5%
A mentoring/coaching scheme was set up	4%
Other	57%

Evidence suggests that by providing reps with facility time, and workers time to attend activities, many individuals will take advantage of the review opportunities available in work time. As Ian Shimwell, a ULR at Astra Zeneca said, ***'I am doing the reviews working with the company. If the training that results is work related it should be done in work time'***.

Also, working with the HR/training departments can lead to the positive outcome of joint work to identify learning and training needs. As was identified in the pilot project:¹⁴

'Senior management commitment to the mid-life career review project was very important, as was regular communication between union and management and the provision of facility time to carry out ULR duties.'

'...the most success was where it was possible to build on strong workplace infrastructure (which may include a learning committee, learning centres, and learning agreements where these exist)'.

2.2.2 Partner agencies

The unionlearn model relies on strong partnerships both at local and national level to support and sustain the mid-life development review process.

During the pilot excellent relationships were built with the National Careers Service (NCS) and their primary contractors, Age and Employment Network (TAEN), Learning and Work Institute (formerly NIACE) and Business in the Community (BiTC).

The unionlearn model emphasises the importance of building a network of local referral points and encourages reps to take advantage of free support from agencies such as health organisations, Citizens Advice Bureaux, Money Advice Services, NCS Advisors, volunteering organisations, learning providers etc. This helps to build up trust and ensure that an objective review process is enhanced.

Respondents were asked in the 2016 survey about which other partner agencies they had worked with since 2014 and of the 16% that said they actively worked with others they gave the following agencies as their partners:

- Age UK
- Colleges and other training providers
- Financial advice providers
- National Careers Service
- Online course providers
- Pension advisors

Of the 84% who are not working with partners this could possibly be because reps feel confident that they can deliver the agenda alone and/or with the support of their union/unionlearn, or that the work of partner agencies is not clearly promoted to union reps and more could be done to access services provided by partner agencies nationally and across the regions. It could also be because unions are accessing resources on-line which tend to be more up-to-date and reliable and the partner agencies quoted above are, themselves, struggling to offer services from their limited resources available.

¹⁴ Unionlearn 'Mid-life career reviews – Helping Older workers to plan their future – Evaluation Report June 2014 – page 14

A good example of where the existence of a union supported learning centre has promoted the Mid-life Review Model is at Home Retail Group (now Sainsburys/Argos):

How learning centres and unionlearn resources can support older workers

Michelle Whitely, Learning Centre Co-ordinator for the past 3 years at Home Retail Group in Widnes (now Sainsbury's Argos) speaks about how she has used the unionlearn mid-life review resources to support her amazing work at the USDAW supported learning centre.

'We are a call centre and team leaders meet with the staff individually every week. They can have shop steward representation at the meeting and we noticed that older staff and team leaders were finding it more difficult to agree on things to say during the sessions.'

Michelle couldn't speak more highly of all the unionlearn resources – *'there's nothing that we don't use here! The cards are used to support coaching and mentoring and are a useful tool to break down age barriers among staff'*

She also uses the cards to help people prepare their CVs and to conduct mock interviews and lots of people have secured internal promotion and some have got other jobs outside the organisation as a step up the ladder, *'it's given them a common language and script to use at interviews that has proved a success.'* She jokingly refers to the cards as *'Tarot for Business!'*

Michelle works with partner providers to deliver apprenticeships and IT qualifications at the learning centre and the 7 ULRs (soon to become 10) support the identification and delivery of other outcomes that have been requested as a result of the coaching and review sessions – namely touch-typing, their own version of 'Silver Surfers' and Dyslexia diagnostic testing. They also use on-line platforms to develop and deliver issue-based courses such as supporting mental health in the workplace which is becoming an increasingly important issue.

Michelle supports up to 100 individuals at any one time and says that the business is pushing her to do even more:

'The new management have been really surprised and impressed by what we do. We have regular communication between the union and management and they are now supporting me to set up a staff forum to consult with staff about what they need going forward'

Michelle appreciates that the challenges of work and using new technology does get harder as you get older and the forum will encourage staff to identify any specific training and support they may need, including any special adjustments in order to continue to do their job. *'As you get older you may need more time, we need to train team leaders to ensure they understand that this is not a negative, older workers can and do contribute so much experience and expertise to this business'*

Michelle believes in this passionately and proudly stated that throughout the whole of 2017 the company is going to be concentrating on *'Age across all our 3 different sites'* and so she will need even more resources to support her initiatives.

'We use the unionlearn signposting guides and we've even produced our own guide to the menopause which forms the basis of our training for managers. We love the Climbing Frame which I call 'The Blockbuster' and encourage all of our staff that use the learning centre to use it to track their learning and progression. We even tell them to include skills developed outside of the workplace such as passing their driving test. This means that when managers ask for reports on individuals they can easily provide this information and show their contribution to the business'

Michelle is a great role model and is extremely focused and committed in what she does *'I run the learning centre like a business – I am very committed to the 'Mid Life Review' process for all staff and feed all our achievements back to management. My union is fantastic, they provide people and networks that we can tap into to continue to improve our work'*

“77% of those that responded said that the unionlearn model is still applicable and being used to engage people.”

2.2.3 The importance of mid-life development to individuals

Individuals in different trades and sectors require flexible review options to be made available:

‘Around one-third of all workers aged 50–59 feel they will not be able to perform their current job at the age of 60 (Eurofound, 2012b). The ability to continue to work later into life varies across sectors and occupations: older workers with physically demanding jobs more often think they will not be able to do their current job when they are 60. For example, craft and trade workers, plant and machine operators, and workers in elementary occupations are more negative about their ability to continue in their job than managers, professionals and technicians.’¹⁵

The 2014 evaluation report stated the following benefits to individuals:

- identify transferable skills and knowledge
- identify training or learning needs
- identify new or flexible roles or promotion opportunities at work
- think about a career change
- consider the right time to think about retirement
- consider ways of passing on skills and knowledge to younger workers
- build confidence and motivation
- create a personal and professional development plan
- improve IT skills through the use of the Climbing Frame and other web-based resources

Respondents were asked in the 2016 survey how many people they have supported in mid-life development reviews: 77% of those that responded said that the unionlearn model is still applicable and being used to engage people.

Many said that the model is flexible for 1:1 support, for various group sizes and even for ULRs to support their own development. Notwithstanding this, there are still areas that are not being addressed sufficiently with 23% saying it did not address all their needs. Many of the issues raised could be supported via improved signposting to available resources such as mini guides www.unionlearn.org.uk/publications/supporting-learners-midlife-mini-guides however some are not within unionlearn’s remit to provide:

- Follow up training not directly linked to business need
- Sourcing good pension advice regionally
- Turning skills analysis into new job suitability
- Ongoing mentoring/coaching support
- IT training
- Effects of menopause on working women

¹⁵ Eurofound (2016) changing places Mid-career Review and internal mobility Publications Office of the European Union, Luxembourg

3. Outcomes

These education and training outcomes bear testament to unionlearn's support of the skills agenda and its success in signposting members to take advantage of these opportunities.

3.1 Positive outcomes for individuals

Outcomes as a result of undertaking a mid-life review are as varied as the starting points of the individuals themselves. A flexible approach is therefore needed by the ULR to ensure that each review meets the unique needs of each person. The previously cited CIPD People Management article speculates whether *'It's wrong to assume certain generations need certain things.'*

The 2016 survey shows that individuals gain a number of related outcomes from the mid-life reviews:

Table 5

Outcomes	Responses
New job (external)	4%
New Job (internal)	8%
Requested a change in working hours/ ways of working	14%
Prevention from redundancy	5%
Looked into volunteering/new voluntary role	14%
Looked into self-employment/ became self-employed	3%
Retired fully	3%
Sought financial advice	14%
Training (English, maths, IT)	17%
Training (work related)	19%
Training (for interest – non work related)	13%
Progression to higher learning	15%
Other	58%

Of the 58% who quoted 'Other', examples given were:

Compulsory redundancy was averted by a successful voluntary program of which most people who volunteered were close enough to retirement for it to be more worthwhile to leave than stay.

My colleague attended the pre-retirement course and said that she found it useful.

I became a Learning Rep

Greater self confidence. Vital for the self employed.

Learning and skills

Work-related training produced the highest response with 19% saying they had benefited from this as a result of the review process, closely followed by 17% who had accessed English, maths or digital skills training and 15% who had progressed to higher education. These education and training outcomes bear testament to unionlearn's support of the skills agenda and its success in signposting members to take advantage of these opportunities.

In fact, if you take the 3 training outcomes and progression to HE responses together they account for 64% of respondents who said that the mid-life review process had resulted in a learning and skills outcome.

The recent *British Social Attitudes* survey outlined the importance of skills development, especially those on lower incomes:¹⁶

'The proportion of respondents saying that they would take up the option to update their skills to help them work longer decreased as household income increased. For example, over a third (36 per cent) of those in the lowest household income quartile said it would help them work longer, compared with 19 per cent of those in the highest household income quartile.'

¹⁶ Attitudes to Working in Later Life: British Social Attitudes 2015

An inspiring example of how a mid-life reflective process and skills development led to tangible changes for a CWU union member and ULR is given below:

Continuing an impressive ‘self-made’ mid-life career change journey

When catching up with Sally Joyner in December 2016 she had had a very busy week...

Sally had just won the ‘Pride of Shropshire’ Learner Award 2016 and she had been busy presenting Dyslexia awards at ceremonies to fellow learners in her area. Sally said ***‘I had a great mentor when I first started learning lip reading and now I enjoy supporting others’.***

Sally, a Royal Mail worker for 30 years started her learning journey many years ago however it was to be many learning experiences later that led to her career change in 2013.

Sally was frustrated that despite enjoying her job at Royal Mail she wasn’t being successful in her application for other roles – ***‘I had a great laugh and really enjoyed my job as a postperson, but even when I improved my skills I wasn’t picking up the jobs that I was applying for. I just wasn’t being encouraged by anybody to use my initiative’***

Finding out she was dyslexic was a real game changer for Sally and when she became a ULR for CWU in 2005. She focused on improving her English and maths and many other courses that took her interest. ***‘I never even thought that I was going to end up being a teacher or run my own business. I just wanted my skills and talents to be used to my full ability’***

Sally organised and participated in many of the workplace learning courses so that she could recommend them to her members. Sally took destiny into her own hands before becoming aware of the unionlearn ‘Mid-Life Career Review’ resources available.

‘It happened organically for me. As a ULR I used the unionlearn website and staff in the regions for face-to-face support; sadly this layer of support is no longer available’

Sally was drawn to lip reading as she had taken sign language courses before and wanted not only to support her profoundly deaf colleagues but all the other colleagues who were hard of hearing. She had noticed that they wouldn’t come to union meetings or engage in learning.

In 2013 Sally took redundancy to focus on her dream of becoming a lip reading teacher. After working to change her habit of ***‘talking too fast!’*** she completed her teacher training in Manchester and now runs courses in partnership with the WEA for NHS patients and organises her own private classes across Shropshire and the Midlands.

Sally is still active in her local branch of CWU but feels that there are still more branches that could engage more with the learning agenda. In terms of unions generally Sally thinks that there is a challenge as to how they can engage and support workers who move jobs more frequently than in the past. ***‘Nobody stays in the same job for life these days and resources such as the mid-life review packs could help many individuals to make the right choices’***

After such a busy and successful year, 2017 brings its own challenges for Sally. She will be busy networking with other self-employed people to build her business and continue to get involved in young enterprise, women in rural areas and dyslexia awareness locally – ***‘I need other people to bounce ideas off and to give myself a break from working from home’.***

Despite working hard making contacts with audiologists and organisations who deal with people using hearing aids Sally is still addicted to learning ***‘I am doing an online course at the moment about building my business and marketing but I need to start making some money now!’*** She already uses twitter and facebook to promote her business and much of her work comes from recommendations. She works with partner agencies such as Women in Rural Enterprise and Age UK.

Sally is happy to provide talks across the Midlands on Health and Well-being days and can be contacted on sallyjoyner24@gmail.com

Flexible working

Other survey respondents also outlined how the mid-life review process can enhance and add value to other important agendas that need discussing in the workplace such as financial and pension advice and negotiating changed working patterns or volunteering.

'It made myself and others look at the wider picture, including the need for financial advice to run alongside this (process)'

'I have now given more consideration to my retirement options'

'I negotiated reduced working hours'

This is mirrored in the recent social attitudes survey¹⁷ which highlighted that currently employed adults said their employer could offer the following tools to keep them working:

- Flexible hours (47%)
- Part-time working (46%)
- Taking on a less demanding role (30%)



The mid-life review process can enhance and add value to other important agendas that need discussing in the workplace such as financial and pension advice and negotiating changed working patterns or volunteering.



¹⁷ Ibid

A worthy example of how an organisation is championing older workers in the workplace is St Leger Homes in Doncaster.

St Leger Homes

St Leger Homes is proud of its ground-breaking work supporting older people at work through their award winning New Directions scheme.

Through the scheme older workers are supported to retrain and work flexibly so that they are not forced out of employment early. This benefits the individuals, their families and the communities in which they live. It also makes business sense as it helps to retain experienced staff, reduces staff turnover and cuts recruitment costs. Younger staff members also benefit as skills and expertise are passed on, particularly in craft and trade occupations.

St Leger Homes has recently won a 'Championing an Ageing workforce' award at the Business in the Community 2016 Responsible Business Awards.

The New Directions programme promotes good practice through:

- career conversations to promote the support and opportunities available
- flexible re-training support for career change or to stay in employment longer
- re-deployment register for staff seeking alternative employment
- flexible retirement options including reduced working hours
- work experience for tenants who face age barriers to finding work

The recruitment and retention programme offers retraining and redeployment opportunities, flexible working arrangements and retirement support to their staff aged 50+ who may need to reconsider their career options.

The aim of New Directions is to ensure the celebration and retention of the skills and experience of its diverse workforce for the benefit of its customers and the local economy, whilst supporting the well-being of staff. Older staff also mentor colleagues and help to upskills new employees – a win-win situation for all!

All senior managers have been briefed about the programme and support their staff to access the appropriate support through Personal Annual Reviews. Working closely with trade unions, the company has produced a 'New Directions Guide' on the intranet which sets out the options available and the policies and procedures that support staff to take advantage of what's on offer. Career conversation sessions are also being planned in partnership with local union learning representatives.

Susan Jordan, Chief Executive said 'St Leger Homes is committed to ensuring it maintains an age diverse workforce, including recruiting and retaining employees over 50 who currently face significant barriers to employment. We recognise and value the experience, skills and expertise our older employees offer... Doncaster is leading the way when it comes to ensuring staff are valued in the workplace'

Key action for St Leger going forward is to continue to value the experience and skills of the ageing workforce, understand the challenges that older employees may face such as health issues and caring responsibilities and continue to have career conversations in a supportive and positive way.

The mid-life review process can also help in other areas such as redundancy situations where union reps can support individuals prepare for the transition into retirement or staged redundancy situations as can be seen from the following case study:

Transition into retirement or support for redundancy

Process Operator and GMB Union Learning Rep Ian Shimwell is successfully using the 'Mid-life Review' Value My Skills cards to support an ageing workforce at Astra Zeneca in Macclesfield prepare for retirement and staged redundancies due to the planned plant closure in December 2018. Ian has worked at the company for 18 years and is also a Health and Safety Rep.

To date, Ian has supported over 70 individual members to review their options whether that be re-skilling and training, leisure courses to pursue a hobby, CV writing to apply for different positions or advice for starting their own business.

Ian said ***'All the members are at different stages in their working lives and have different aspirations. At Astra Zeneca most staff are aged 50 plus and the Mid Life Review allows each individual to take stock and discuss the options available to them'***

Ian works with two other reps and the HR department to organise training days based in the 'Opportunity Centre' at the plant. Most members choose union-funded training where it is available and sometimes company-sponsored training to update skills. GMB provides support where necessary to put on extra courses and provide additional resources such as redundancy booklets which include a mid-life review section as part of the content.

Ian acknowledges that not everyone needs his support ***'I'm very happy if they do it themselves'***, but is proud that even those who initially did not want to engage in union learning are now coming to him for advice and support

'Even those non-respondents now want to do CV Builder, they are not so negative as they once were'

Ian has tapped into the company business mission which is to 'make Astra Zeneca a great place to work'. He has the full support of management, HR and the training department and they have given staff time off for training activities based on the shift pattern of individuals and he has secured facilities time.

He knows that the two years left will go very quickly and he thinks he is offering staff the opportunity to look at alternatives to redundancy in a positive way

'The staff are not fearing change now but they are looking at the transition more successfully. There are alternative directions for some and others will at least be more prepared for the phased redundancy process as it rolls forward'

Ian is not forgetting his own needs whilst taking time to help others. He is currently studying for an Information, Advice and Guidance course and keeping his options open as to possibilities for the future.



The union learning representative can play a unique role in promoting and supporting mid-life reviews in the workplace.



3.2 Positive outcomes for reps

The union learning representative can play a unique role in promoting and supporting mid-life reviews in the workplace.

Being involved in delivering mid-life development reviews has had a positive impact on union reps, their relationships with the workers they support and the management they work with as evidenced by the following responses:

Table 6

Outcomes	Responses
Improved relationships with managers/colleagues	27%
Increased peer learning or knowledge sharing with colleagues	27%
Increased confidence to work with mid-life and older workers	29%
Improved knowledge/skills to work with mid-life and older workers	31%
Developed or found new resources to use with mid-life and older workers	23%
Developed new ways of working with mid-life or older workers	18%
Opportunity to use existing skills more regularly	24%
Increased job satisfaction	19%
Increased job security	3%
More knowledge about own career development and opportunities	26%
Given more consideration to own retirement options	20%
Other	46%

Of the 46% who quoted 'Other', examples given were:

Promoted the trade union movement and the trade union I represent.

I took early retirement at 59, on a full pension paid monthly.

Improvements to knowledge, skills and confidence were the key factors highlighted together with enhanced relationships with managers and colleagues and the use of new resources.

ULRs themselves also benefited directly from being involved in the process with 26% saying it had given them more knowledge to examine their own options and 20% giving more consideration to their own retirement options.

This supports the findings of the unionlearn evaluation report which summarised the following benefits of mid-life development reviews for ULRs and other reps which are unique to the union offer to its members:

- reach people who may never have had help in planning their career or learning
- help those people and their families plan for the future
- help those people to become more confident in making decisions about learning and work
- engage with their employer
- work in partnership with the National Careers Service and other organisations
- gain experience in using the Climbing Frame to support learners, and have a chance to use the new Climbing Frame app'

3.3 Positive outcomes for the workplace

The most positive outcome from this question was 26% of respondents said that the review process had developed the skills of staff, improved staff morale (18%) and developed new ways of working (17%).

Where it is linked to the skills agenda and/or the appraisal or PDR process within a workplace it can have even greater impact as evidenced by the work being undertaken by the TSSA union across three workplaces. The project used the Value my Skills Cards resource as an activity in a wider organisational development programme jointly developed and delivered by the WEA.

A union-led approach to professional development review using unionlearn mid-life development review resources

The TSSA's 'Improving Performance and Development Reviews Project' works in targeted companies to support a structured approach to training and development of the workforce. The rail industry being male dominated and the travel industry being female dominated poses its own challenges to the concept of 'mid-life review' that has led to bespoke solutions from the union.

Sal Morawetz, Education and Equalities Officer at TSSA outlined the process to date:

'TSSA prides itself on its own Professional Development Review (PDR) process so as part of this project we surveyed unions in targeted companies to find best practice. However, we also found that some Training and Development and PDR processes were sketchy and tick box focusing on current competences with no structured approach to offering development opportunities'

Sal went on to explain how the project uses one specific tool from the unionlearn 'Mid Life Career Review' resource pack to support the project

'We use the 'Value My Skills Cards' in different ways – ULRs work with individuals and set up sessions in workplaces. These have proved useful for individuals and act as a springboard but do not really have an impact organisation-wide.'

Sal believes that the individual approach on its own is not enough. So, in partnership with the WEA as training provider and utilising ULF funding, she has worked with three companies to develop a training programme using the cards to generate discussion both with individuals and collectively in groups.

The feedback from reps is that the cards are a great resource but need to be used flexibly to suit different groups of staff.

The project is still at pilot stage and one key benefit has been to enhance the joint working between HR departments and union reps leading to better employer engagement.

Sal firmly believes that if the process is going to result in real culture change across the targeted organisations then *'we need to widen the agenda to get people who are not engaged with the skills debate embracing this project. It's helpful for ULRs to see 'mid-life review' from a wider perspective – not just how does this affect individuals but how does this fit into workforce development'*

It is clear that there is no a short-term solution, it requires support and commitment over a long period from both unions, management and policy makers

Other positive outcomes identified for the workplace were an improved service (13%), greater customer satisfaction (11%) and the strengthening of existing partnerships (12%).

3.4 Other outcomes

As a result of the survey questions, a number of added value outcomes were identified:

- that the review process had led to more regular communication between the union and management (13%)
- and led to a greater commitment from senior management to the mid-life review process itself (11%).

Where a limited union infrastructure exists, the mid-life review process has ‘added value’ to this resulting in new learning agreements in 9 cases, the establishment of a learning committee in 5 workplaces, a learning centre in 6 organisations and increased facility time in 8 workplaces.

Table 7

Outcomes	Responses
Learning agreement/learning committee/ Learning centre/increase in facility time	24%
Senior management contribution to mid-life development reviews	11%
Regular communication between the union and management	13%
Not applicable/don’t know	52%
Other	23%



Where a limited union infrastructure exists, the mid-life review process has ‘added value’ to this, resulting in new learning agreements in 9 cases, the establishment of a learning committee in 5 workplaces, a learning centre in 6 organisations and increased facility time in 8 workplaces.



4. Issues and challenges in delivering the mid-life review

Although the roll out of reviews continue, they cannot be delivered in isolation. They need to be flexible and linked to other important HR agendas as part of a more holistic 'age management' agenda. As identified in the EU report:

'Different instruments have been developed by companies to retain ageing workers such as:

- *promoting 'employability' (skills) and for older workers specifically;*
- *intergenerational knowledge transfer; that is, involvement in training younger workers;*
- *flexible working arrangements, with more partial retirement schemes;*
- *opportunities for internal mobility.*

*Most of these instruments are part of age management and can also be subject to discussion during MCRs. An MCR should be a systematic and objective in-depth assessment of motivations, skills, capabilities and interests in order to successfully plan a consecutive episode of professional life.'*¹⁸

71% of respondents in the survey said they didn't encounter any issues in delivery which shows how successful the initial support during the pilot project must have been. However, 29% still said there were issues to address with the following being the most common:

- accessibility due to shift patterns
- lack of engagement within the company
- not enough time available to identify staff who need support and time to deliver that support
- offered too close to actual retirement to be of benefit
- fear of change from individuals
- lack of interest or fear of inadequacy
- negative attitudes to older workers
- men were harder to reach and get to participate
- feelings of despondency amongst older workers especially around work-based changes/challenges

4.1 The importance of language

One of the most interesting challenges was posed by the Inclusion and Diversity Manager at Age UK who talked about some of the reservations, based on misconceptions, coming from individuals in her organisation:

'The concept of 'Mid-Life was not widely understood at the beginning and many linked it to 'Mid-Life Crisis!'. Even though we advocate a self-identification approach where it's up to employees to decide when they think the review would be helpful, some colleagues have taken offence at the idea that they might be considered to be at 'mid-life.'

She goes on to ponder what this means for her organisation, especially when it specialises in supporting older people:

'Given that we are an organisation that focuses exclusively on ageing and working for and with older people, its interesting (to me) that it still seems difficult (and/or even problematic) for some of our staff to identify and 'own' their own ageing process'

Perceptions and the power of language was also an issue and taken into account during and after the pilots in 2014 when the word 'career' was used as in 'mid-life career review' (NB European partners still use the term Mid-Career Review (MCR) even though it remains controversial for some working people especially when it only relates to certain types and levels of paid work). Many people do not see themselves as having a career, so that is why unionlearn amended the description of the model to mid-life development review.

It is acknowledged that the term 'mid-life' may also be problematic as identified by the Age UK comments above. However, it does seem to allow for the varied perspectives people have on their lives and that adults of all ages can benefit from a development review although one would anticipate that the priority issues raised may be different for different age groups.

¹⁸ Eurofound (2016) changing places Mid-career Review and internal mobility Publications Office of the European Union, Luxembourg



Unions are better placed than most other agencies to support individuals through their unique network of active ULRs in the workplace.



4.2 Funding

Many of the survey respondents highlighted lack of funding as a barrier to the continuation of reviews, issues such as transportation in rural areas and time off for training activities

Even though the union model is very cost effective in relation to other models that exist, a 'bargain price of £50 per head' (others between £100 and £350 per head) as the EU report noted, it is still important that development funding is available for continued research, monitoring impact and continued development of up-to-date resources and information.

5. Unionlearn resources to support mid-life review process

As part of the 2014 project a wide range of resources were developed and adapted for use by ULRs and other partners. A toolkit was assembled in a dedicated learning theme 'Supporting Mid Life Development' on the unionlearn Climbing Frame

<https://climbingframe.unionlearn.org.uk/Home>

Respondents were asked in the 2016 survey which resources they had used the most over the past 2 years.

5.1 Value My Skills cards



Overwhelmingly the 'Value My Skills' cards, which were developed as part of the 2014 project were the most successful with 51% of respondents saying they had used them.

The Value My Skills cards are an engagement tool designed as an interactive game that encourages the participants to think about their transferable skills. The skills cards contain statements about skills that are found in a wide range of occupations and other life roles.

The cards can be used in a variety of circumstances to help identify skills that the person already has or development that they may wish to undertake to widen their skills set e.g. English, maths and ICT skills. The skills can be linked to workplace competencies and help prepare for workplace development and training reviews. In addition, the terminology on the cards can be used to prepare a development plan, write a CV or job application form.

The Value My Skills cards seem to have gone down very well and have been appreciated and were useful

I still use the cards in my new role as organiser in the independent health sector

People engage easily with them and get a lot out of doing the exercise

The cards are a good way to break the ice and encourage staff to engage

Good conversation starter and gave structure to the conversation

Increases employees' confidence and makes them more aware of the skills they possess

Quick, easy and thought provoking

² IPD People Management December 2016 – 'The Lowdown on Age'

“The cards and questionnaire help to focus the member and ULR on the task

”

There was an associated ‘Older Workers Quiz’ also developed, which 9% of respondents had used with a similar number making use of the pre- and post-review questionnaires which provide a structured and evaluative approach to the process:

‘The cards and questionnaire help to focus the member and ULR on the task’

5.2 Signposting guides

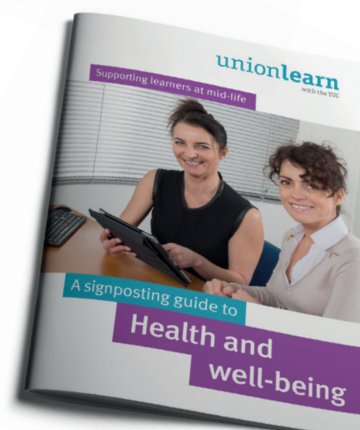
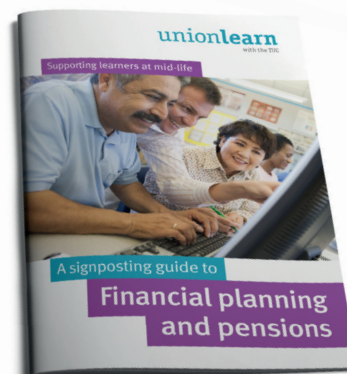
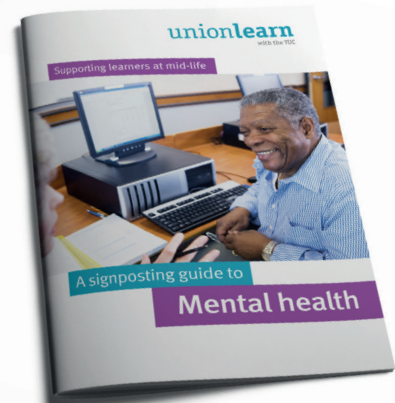
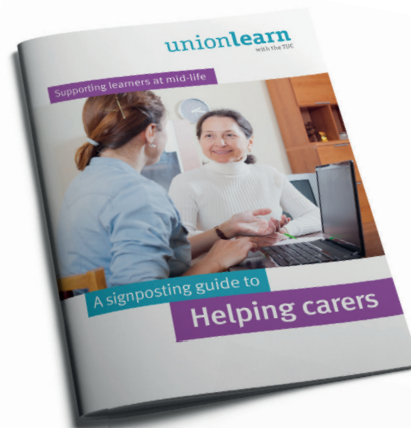
Unionlearn developed 4 mini guides in July 2016 which have been well-received and much appreciated by the survey respondents.

There are signposting guides to: *Helping carers*; *Mental health*; *Health and well-being*; and *Financial planning and pensions*.

17% of respondents have used the *Mental health* and *Health and well-being* guides and 15% the financial planning guide.

5.3 Other resources used

12% of respondents found the *Valuing the skills of older workers: how to do a mid-life review* publication and ‘Getting Active – a resource pack for union reps to support mid-life development’ booklet useful. A similar number also accessed the e-Note and Climbing Frame theme.



“All of the feedback received has been really positive and helped to change the mindset of some of the staff members.”

5.4 Areas for further development of resources

Respondents identified the following resources that they would like to see further developed. Included in the summary is a response from unionlearn to show that many are already in existence but with the acknowledgement that more could be done to ensure reps know where and how to access them.

N.B. This is not a complete list of all available resources.

In summary the resources haven been well-received and proved invaluable as tools to support ULRs to deliver successful reviews in the workplace. This can be summarised by the following comment

‘All of the feedback received has been really positive and helped to change the mindset of some of the staff members. I have received a thank you for all the value my skills cards supplied and the support that this has offered staff’

Request for more resources	Already available to unions
On-line support/printable information on webpages	Printable support materials can be found in the Supporting Mid-life Development learning theme on the unionlearn Climbing Frame website.
Directory of relevant organisations	The directory can be found in the Supporting Mid-life Development learning theme on the unionlearn Climbing Frame website.
Video or DVD of mid-life/older workers who have benefited	A video was produced in 2014 however, unionlearn is planning to produce more up-to-date and relevant Webinars to support reps in making the business case for mid-life reviews.
Activity pack to support delivery Clearer instructions with the value my skills cards	The toolkit can be found in the Supporting Mid-life Development learning theme on the unionlearn Climbing Frame website.
Easy to access pension and financial advice A pension guide please	The Supporting Mid-life Development Financial Planning and Pensions mini guide was launched in July 2016. A pdf version can be obtained on the unionlearn website.
English, maths and IT exercise booklets	There are many sources that contain English, maths and IT exercises. The unionlearn website contains wealth of resources. www.unionlearn.org.uk/english-and-maths-learning-resources-and-tools Learning centres also have resources. You may also wish to explore websites such as the Excellence Gateway www.excellencegateway.org.uk
Anti-bullying, fighting ageism resources	The TUC campaigns against discrimination at work and in wider society. There is a broad range of information (including bullying and age discrimination equalities legislation, campaigns and resources).
Poster promoting mid-life development	In response to feedback, unionlearn is planning to produce a promotional poster for mid-life development reviews.
Menopause in the workplace and general resources on well-being	TUC published a Supporting working women through the menopause: Guidance for union representative's booklet in November 2013. A pdf is available on the unionlearn website.
More workshops would be good	Supporting Mid-life Development is an integral part of the unionlearn work and workshops are delivered as part of unionlearn events. All events can be accessed on the unionlearn website. Unions can request bespoke sessions via the unionlearn team.

6. Going forward

There were many positive comments on the unionlearn mid-life review development process reflected in the quotations below:

Extra consideration and flexibility needs to be given to this age group who still have caring commitments either supporting growing children or ageing of close relatives

It was well-received by staff and information was cascaded

It's an important issue and needs to be kept on the agenda

We used the value my skills cards with a group of supported volunteers – those who have additional needs and found them extremely good

Great for those who have lots of life skills to share but might have missed out on formal qualifications

We are setting up a forum to find out what our older workers need the most, the resources help people move within the business, find work outside of the business and to write CVs

I am hoping the advisors will use the value my skills cards to prepare for coaching and one-to-ones with their Team Leaders so that they can be more in control of the coaching sessions

Respondents were also asked to suggest other issues that unionlearn could consider in taking this agenda forward.

Signposting to external agencies

- Many wanted to know more about the services and support offered to companies and individuals by the National Careers Service and whether it would be possible to 'test out' the support and advice available to enable union reps and managers to signpost colleagues with greater confidence.
- Better pensions and financial advice to be made available

Ongoing support for reps

- How to continue to develop and mentor reps to run one-to-ones, surgeries and events in the workplace

Sharing good practice

- Branches sharing successes with other branches.
- Good communication and building up networks for support and advice

Wider promotion

- More general information, how to use the resources more strategically and within a wider organisational context.
- More resources to support training.

Further development of resources

- More presentations to use at events,
- An App to support delivery and online assessment tools for English, maths and digital skills
- Activity that can be done at your desk!

Links to appraisal/performance review

- Making this part of annual CPD and teamworking activities,

6.1 Recommendations

1. Everyone at the age of 50 should have an entitlement to a mid-life development review
2. More funding is required to increase union capacity to deliver mid-life development reviews
3. More could be achieved through closer partnership working with the National Careers Service and other appropriate agencies
4. Support for the ongoing development of online tools to encourage reps to undertake mid-life development reviews
5. Ongoing development and support for reps
6. Facilities time for reps and time allocated to staff to conduct mid-life development reviews
7. More employer engagement in this agenda
8. Reps are well placed to raise this as a bargaining issue

7. Conclusion

As is evidenced by the survey respondents outlined in this report, the concept of union supported mid-life development review is still current and being used across many diverse organisations and workplaces. It provides an extremely cost effective way of delivery, using ULRs as trusted intermediaries, and continues to help to meet the demographic challenges of an ageing workforce.

Whilst specialist resources and support for mid-life development reviews have proved useful to union reps and employers it is clear that the agenda is moving forward in organisations. Interventions like the mid-life development review process are being moulded and developed for use with all ages of the workforce. More 'age agnostic' approaches can be found across organisations together with the development of more intergenerational action learning training resources embedded into more holistic flexible working discussions. The ability to offer on-going information, advice, guidance and skills development to all the 5 generations of the workforce that now exist has never been more important to ensure continued improvement across organisations.

With the apprenticeship levy, we may see more employers support apprenticeships for all ages, and this could offer flexible opportunities to unions to secure quality opportunities for the older workforce to re-train. However, unions will need to campaign to ensure that this flexibility cannot be used by businesses to re-badge existing staff as apprentices. Barclays provides a good example of this through its 'Bolder Apprenticeships' programme which acknowledges that almost half of the UK 50+ wanted to re-enter the workforce if they had spent time away from it. The life experience this generation offers together with proven loyalty adds an extra dimension to recruitment strategies. Skills development is critical for this group to ensure continued adaptability to the changing needs of the workplace.

Roger Jeary has undertaken some practical work and research on behalf of the TUC for the Workage Project www.workage.eu and the 7 recommendations outlined in the 2014 TUC Report ¹⁹ still remain current.

Ageing workplaces present major challenges to the trade union movement in terms of organising, representation and bargaining, as is the need to recognise diversity within the older workforce.

As the Workage project outlines:

'There are those that delay retirement because they want to, while others are compelled to work longer for economic reasons and others who want to work but are prevented from doing so by health reasons....Trade unions need to provide support in many different ways to meet these diverse needs and workplace interventions (such as mid-life development reviews) offer a solution to some of the challenges.' ²⁰

The view from Europe also endorses the union-led model as a good practice way forward:

'ULRs or community learning advocates seem to be worthy of consideration and further evaluation. In terms of cost benefits and employee engagement, the unionlearn approach could well prove to be an exciting and innovative model. It calls for further research and consideration of its potential as an idea which could be transferred to other countries.' ²¹

The survey highlights and this report clearly conveys the following key messages:

- mid-life development reviews are most effective where there is employer support and the organisation has a robust learning infrastructure e.g. learning agreement, learning committee, learning centre etc
- the unionlearn mid-life development review is a cost effective model and provides value for money
- mid-life development reviews are an effective intervention for keeping older workers in the labour market
- mid-life development reviews are a valuable intervention for identifying literacy, numeracy and ICT skills needs
- mid-life development reviews provide effective support to workers to make career transitions later in life

¹⁹ TUC – 'Representing an ageing workforce: Challenges and opportunities for trade unions' Dr. Matt Flynn

²⁰ Roger Jeary – Workage on TUC website

²¹ Eurofound (2016) changing places Mid-career Review and internal mobility Publications Office of the European Union, Luxembourg

Resources

Unionlearn

www.unionlearn.org.uk

Unionlearn publications

www.unionlearn.org.uk/publications

Unionlearn Climbing Frame

www.climbingframe.unionlearn.org.uk/Home

TUC

www.tuc.org.uk

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