



Valuing the skills of older workers

How to do a mid-life development review

A practical guide for union reps

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Foreword

Like dental or health check-ups, mid-life development reviews for workers should become a natural and routine process. Unions who are delivering reviews in the workplace are finding that personal interactions, made face-to-face not just via a computer or even a telephone, are very important to build confidence and motivate people.

Mid-life development reviews are about starting a conversation and discussing careers in the workplace in the context of the whole of people's lives. People don't get enough chances to talk about themselves in a positive way, and it can be very exciting to discover that someone is taking an interest and it is not too late to make a change or take up new opportunities. Having a review can have a considerable impact on people's lives: it gives people space to think, take stock and locate specialist help.

Unions are ideally placed to introduce workers to this process. The ULR has a unique role as a trusted intermediary, reaching those who may be disadvantaged or vulnerable in the workplace. They recognise that the aspirations of all working people are important and that everyone can develop their skills and make progress in their lives. This guide provides a simple and practical introduction for reps to mid-life development reviews.



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A handwritten signature in purple ink that reads "Frances O'Grady". The signature is stylized with a large 'F' and a long, sweeping underline.

Frances O'Grady
TUC General Secretary

Unions supporting mid-life development

Who will benefit from this guide?

The unionlearn model for supporting mid-life development puts you, the union learning representative (ULR) or other union rep at the heart of a review process that takes the whole person into account. It applies to any working adult, whatever sector, workplace or union they are in.

The process will be helpful to any working person, whatever their age, although the term “mid-life” has been used in the original project to develop this work. The mid-life development review process is particularly helpful to support workers to prevent early drop-out from the labour market and to support those whose workplaces are being re-structured.

Will the review benefit any worker?

The review process is applicable to everyone, not just those who see themselves as having a professional career or those who have been lucky enough to have stayed in work and been promoted.

The unionlearn model approaches work as a whole of life activity – underpinned by values, interests, skill development, relationships and networking. People may want to develop themselves in all of these personal and professional areas:

- paid work
- learning
- voluntary work
- leisure activities
- family commitments such as caring for others.



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How can I adapt the model for my union and my workplace?

The model has been designed to be adaptable so that different unions and workplaces can meet the specific needs of individuals, and fit the review process into the time available to both reps and workers. You can choose the topics for discussion and the resources best suited to those topics, and decide how and when to involve other specialists or contacts. You can also decide whether to get together as a group to explore the issues or whether to work one-to-one. It is up to you.

Quick Starts

You don't need to do everything! In fact, you can make a difference by just doing one thing. Throughout this guide there are Quick Starts suggesting one key action you can take to get you started on each stage of the process. Here is an example:



Quick Start!

If you only do one thing...

You may decide that you want to focus on transferable skills and start the discussions by using the Value My Skills cards. This can lead to CV building and careers advisers can help with that.



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Checklist of activities

The checklist, over the page, includes all the activities mentioned in this guide. Complete it to keep a record of those that you think would be effective in your workplace.

How to do a mid-life development review

Activity	Page number in this guide	Yes, I want to do this	Not applicable	Completed
Read and check out resources to help you				
Talk to people with experience of mid-life reviews				
Attend a briefing session				
Do the Supporting Mid-Life Development and Supporting Learners eNotes				
Have a review yourself				
Find others to work with you (network)				
Create a signposting directory				
Find out what people in your workplace want (survey)				
Find out what is already going on in your workplace and your union (map)				
Get your employer on board – make the case				
Decide where to do your reviews				
Order resources such as the <i>Value My Skills</i> cards				
Register on the Climbing Frame and learn how to use it				
Encourage people in the workplace to come forward				
Decide whether to work one-to-one or in groups or both				
Use pre-review questionnaires with individuals				
Explore aspirations and needs:				
• Discuss issues identified in the pre-review questionnaire				
• Interview individuals – ask open questions and listen				
• Do the timeline activity with people				
• Set up some group activities where people can help each other				

Activity	Page number in this guide	Yes, I want to do this	Not applicable	Completed
Address problems and plan to overcome barriers:				
• Identify barriers and issues				
• Discuss solutions				
• Signpost and refer				
Identify transferable skills:				
• Use the <i>Value My Skills</i> cards or the App				
• Use the National Careers Service Skills Health Check				
• Write a skills-based CV with evidence of using skills				
Research and provide information:				
• Use the learning themes on the Climbing Frame				
• Signpost or refer people				
• Invite specialists to run workshops or talk to individuals				
Set goals and make action plans:				
• Break actions down into small steps				
• Identify information and support needs				
• Record the action plan				
• Arrange to review action plans				
Celebrate achievements				
Motivate people to keep going				
Maintain a dialogue with the employer				
Arrange follow up reviews as needed				
Evaluate what you are doing and try new things				
Feed back to your union and unionlearn				

What do older workers want to talk about?

These are some of the areas that workers may wish to discuss as part of a mid-life development review.





Quick Start!

If you only do one thing...

Use a pre-review questionnaire to find out what peoples' priorities are and then you can be prepared for the topics that interest them. Questionnaires you can use and adapt are available to download from the Supporting Mid-Life Development learning theme on the Climbing Frame <https://climbingframe.unionlearn.org.uk>

As a ULR, what can you help with?

Remember as a ULR or other union rep you are not expected to be an expert in everything! You may have done some training in advice and guidance, mentoring, coaching or counselling, in which case you can offer more in-depth support. If you don't feel confident to do this, there is a range of specialists who can help with information, resources and advice. You can signpost colleagues to them or bring the experts in to the workplace to help.

Work options

You can help people to think through their options for paid and unpaid or voluntary work, and signpost professionals who can open up the full range of opportunities. You can also help people to recognise transferable skills and knowledge and help them to put together a CV.

Finances

A ULR should not attempt to give advice about personal finances, pensions, pay or redundancy payments. Your union will be able to provide information and advice on these issues. You should find out who to signpost workers to in order to get expert and personalised advice about these areas. You can find out about funding for learning, and grants and bursaries to support study but again, it is always better for the individual to check for

themselves with an expert. You can invite experts into the workplace to run workshops and provide information.

Relationships

This may be part of the initial exploration of what an individual would like to discuss. It may be important to sort out relationships at home, in personal life and at work before the person can progress and move on in their career. You cannot be expected to be a counsellor unless you have specialist training and should signpost colleagues to relevant counselling organisations for further help. Caring relationships may have significant impact on careers and again there are specialist organisations which can help.

Learning

This is at the centre of the ULR role and you can find information, arrange for learning opportunities to be made available in the workplace, put colleagues in touch with providers, and offer continuing support for learning. The ULR and union learners can also get help from unionlearn, their union, the National Careers Service (NCS) and from course providers.

Health and well-being

This will be an important part of a mid-life development review. People don't know whether they will be lucky enough to enjoy good health and whether this will affect their work. They do need to know how to plan for optimum health and what role learning activities can play in this. ULRs should always refer people to their GP or to medical specialists for specific problems but can set up learning opportunities in the workplace to help everyone to keep mentally and physically fit.

Leisure

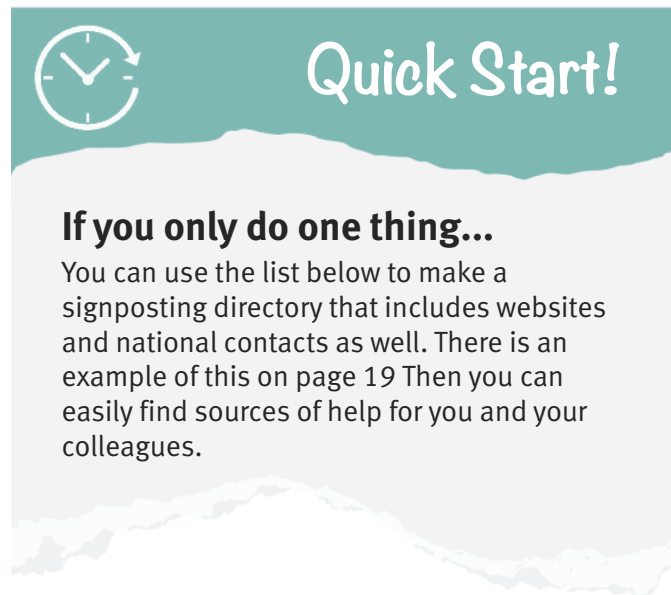
People develop many transferable skills through leisure activities and may wish to spend more time on these as they approach retirement. You can find information about leisure activities and learning opportunities linked to these. Some people may wish to turn their leisure activities into a paid or voluntary role.

Values

This may form part of the initial discussion about careers – people may feel that their current job does not reflect their values. They may also feel that they want to spend the latter part of their career or their retirement doing something that seems worthwhile to them, or putting something back into society by helping others. Giving people some space to discuss these issues and taking them seriously can be very important, but again, you can refer people to specialist organisations for personal counselling as appropriate.

Working with others and signposting

To deal with mid-life issues, below is a list of the types of face-to-face contacts you may be able to find locally or in your workplace.



Quick Start!

If you only do one thing...

You can use the list below to make a signposting directory that includes websites and national contacts as well. There is an example of this on page 19 Then you can easily find sources of help for you and your colleagues.

I want to...	Who else can help locally?
Keep my current job	Union rep / Line manager / HR department
Request flexible working arrangements	Union rep / Line manager / HR department
Work part-time	Union rep / Line manager / HR department
Get a promotion	Line manager / HR department
Re-train for a new role at work	Union rep / Line manager / HR or training department / Training providers
Deal with redundancy or re-structuring	Union rep / Line manager / HR department / National Careers Service
Develop new skills for paid work	National Careers Service / HR or training department / Training providers
Improve my work-life balance	Union rep / National Careers Service / HR department
Think about a new career	Union rep / National Careers Service
Apply for a new job	Union rep / National Careers Service
Recognise my transferable skills	Union rep / National Careers Service

I want to...	Who else can help locally?
Develop a CV	Union rep / National Careers Service
Make a difference through voluntary work	Union rep / National Careers Service / Local voluntary organisations
Develop union roles and responsibilities	Union officers and reps / TUC and unionlearn
Plan for retirement	Learning providers – pre-retirement courses / Citizens Advice Bureau (CAB)
Learn something new	Union rep / National Careers Service / Local library / Learning and training providers
Start some new leisure activities	Local library / Leisure centre
Sort out my personal finances	Independent Financial Adviser / Citizens Advice Bureau (CAB) / Union officers and reps
Find out about pensions and benefits	Independent Financial Adviser / Citizens Advice Bureau (CAB) / Government website and Age UK
Decide how to fund learning	National Careers Service
Get help with caring responsibilities	Local voluntary organisations / Carers UK / Citizens Advice Bureau (CAB)
Discuss relationships	Counsellors
Discuss specific health issues	GPs or other health professionals
Plan to get fit and improve well-being	GPs or other health professionals / Training providers / Leisure Centre



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The role of the ULR

As trusted workplace intermediaries, union reps are in a unique position to deliver mid-life development reviews. Your initial training as a ULR or union rep will have given you a head start – you may have thought about how to:

- develop questionnaires, carry out a workplace survey and identify learning needs
- make the case to employers and develop learning agreements
- interview, ask questions and listen to colleagues in the workplace
- signpost or refer colleagues to other organisations or individuals who can help

- solve problems and make action plans
- identify and set up learning opportunities.

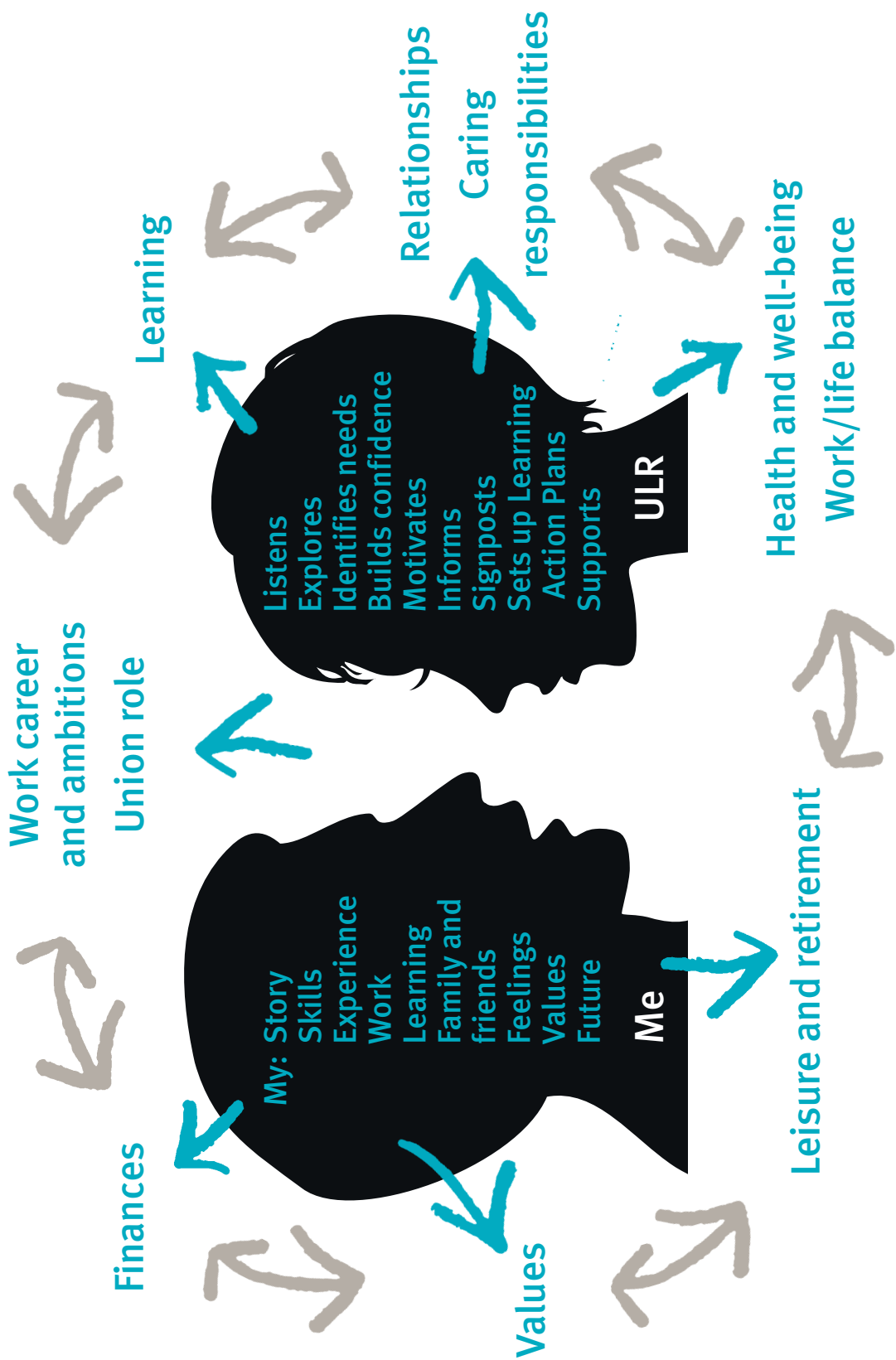
These all involve skills needed for mid-life development reviews.

You may also have done some further training, attended courses and events about supporting learners, or completed the TUC Education eNotes Supporting Mid-Life Development or Supporting Learners. You are probably much more prepared and skilled than you think, although you don't need to start until you feel ready to do so.



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Mid-life development reviews



Your role in the mid-life development review is quite simple. It is to:

- provide a reflective space for colleagues to discuss their situation
- listen and ask questions
- explore the issues
- build confidence
- increase motivation
- identify learning and other needs
- give information
- point colleagues to specialist organisations
- set up learning opportunities
- help to make an action plan
- provide continuing support
- make a case to employers.



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Quick Start!

If you only do one thing...

Get some help to carry out your role from unionlearn staff, ULF project managers and union project workers. This support for you can include training, briefing, encouraging and motivating through face-to-face, telephone and email contact, as well as providing information, advice, resources and networking contacts. You can find contact details for unionlearn regional and national staff on the website www.unionlearn.org.uk or contact your union.

Delivering mid-life development reviews – three stages

On the right is a menu of activities over three stages to suit your role as a ULR, your union and your workplace. You don't have to do everything with everyone!

The checklist on pages 6–7 provides a short summary of activities to make it easier for you to decide on the best way of working.

It is very important that you don't try to take on new roles that you don't feel knowledgeable, trained or supported in – there are specialists and experts who can help, and you should work together with them.

The mid-life development review

A three stage model

The three stages of the model offer a menu of activities which reps can choose from in order to meet the needs of workers.

Stage 1

Getting started

- 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 directory of contacts for information and referrals
- registering on the union learning Climbing Frame.



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Stage 2

One-to-one or group activities

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



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Stage 3

Reviewing, follow-up and support

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



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Stage One

Getting started

Get support for yourself

There are many types of help available to get you started, from your union, unionlearn and other organisations.



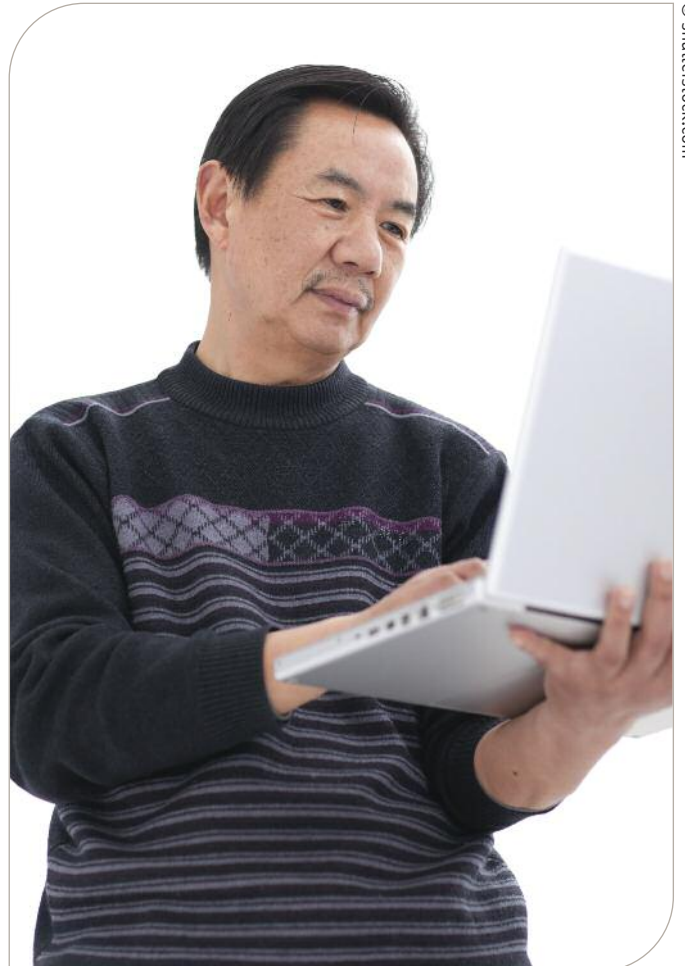
Quick Start!

If you only do one thing...

Before you start, have a review yourself. Ask another rep in your union with some experience of doing mid-life development reviews, a ULF (Union Learning Fund) project worker, unionlearn staff or a National Careers Service (NCS) adviser. Having a review yourself is a great way of getting a feel for the process and the issues that workers will want to discuss. It sometimes works best if you talk to someone you don't know at all at an event or a group session, so that you can re-invent yourself without any pre-conceived ideas or assumptions getting in the way.

As well as having a review yourself, other ways to get started are:

- Contact your union, including the ULF project worker if there is one, to find out what is going on in your union in different parts of the country and if anyone is delivering mid-life development reviews. Visit the ULF website at www.unionlearningfund.org.uk
- Unionlearn staff can offer information, resources, support and encouragement for the mid-life development review process. Find a regional contact at www.unionlearn.org.uk/contact



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- Unionlearn can offer a briefing session for your union, with a chance to practise the skills needed and to try out resources. Contact Jane Warwick jwarwick@tuc.org.uk for more information.
- You can work through the TUC Education eNotes Supporting Mid-Life Development and Supporting Learners if you want to find out more about interviewing skills. Register for eNotes at www.tuceducation.org.uk
- You can look at the Supporting Mid-Life Development learning theme on the Climbing Frame and download or order resources. The Climbing Frame can also be used as a recording and action planning tool and it gives you easy access to information on a range of topics. Register for the Climbing Frame at www.climbingframe.unionlearn.org.uk
- The NCS can work with adults who are facing restructuring in the workplace or redundancy, and may be able to offer workshops and group or one-to-one sessions in the workplace. Visit the NCS website at <https://nationalcareersservice.direct.gov.uk>

- Visit the unionlearn website page www.unionlearn.org.uk/supporting-midlife-development for further advice and information.
- For the latest news register on the unionlearn website to ensure you receive regular updates. www.unionlearn.org.uk/user/register Also follow us on Twitter and Facebook (see resources on page 35).

As you can see, there are lots of free resources to help you to provide access to mid-life development reviews in your workplace. More are listed in the last section of this guide.



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How to build a mid-life development directory of contacts for signposting

The scope of the mid-life development review may be very wide and may include areas for discussion that you are not qualified to help with. What you can do is offer to find out where help is available.

You may want to compile a list or directory of websites, national and local organisations or specialists and telephone helplines for signposting purposes. As you help more people to start thinking about their mid-life development, you can add to this and divide your directory into topics; for example, pensions or careers advice.

You can record this information in any way that suits you best and fits with your way of working. If you need something portable you can record the information in a small notebook, like an address book, or if you prefer electronic methods, you could include your directory in the My Notes section of the Climbing Frame or another online storage tools and use this on your smartphone or tablet. If you do your mid-life development reviews in a learning centre and have access to PCs or laptops you may want to create a Word or Excel document.

You can include: workplace contacts; union and unionlearn contacts, local and regional agencies, local contacts for national agencies and other useful websites.



Quick Start!

If you only do one thing...

Have a look at some websites where the work has been done for you. A good place to start is the Supporting Mid-Life Development learning theme and other themes on the Climbing Frame, such as Health and Well-Being in the Workplace and Supporting Learners, or agencies like the NCS or Citizens Advice, which has a very useful national website www.citizensadvice.org.uk

On the next page is an example of the kind of information you might include on the topic of financial advice, that you should never attempt to give yourself but always signpost or refer. You could add to this by making named contacts at local organisations, and, of course, check out what is available through your union or your employer and add those contacts too.



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Example of directory of contacts for signposting for mid-life development review

Financial and pensions advice		
Unionlearn	https://unionlearn.org.uk	Useful links to information and organisations
Climbing Frame	https://climbingframe.unionlearn.org.uk	Supporting Mid-Life Development learning theme – useful contacts
Citizens Advice	www.citizensadvice.org.uk	Local Bureaux also
Money Advice Service	www.moneyadviceservice.org.uk 0300 500 5000	Free national service available online or by telephone
Pension Wise	www.pensionwise.gov.uk 0300 330 1001 8am-10pm Mon-Sun	Free government service, will be able to offer phone and face-to-face guidance via CABx
Worksmart	www.worksmart.org.uk	TUC information website
National Careers Service	https://nationalcareersservice.direct.gov.uk • 0800 100 900 national free helpline	Available in libraries and other venues – call for details. Will signpost financial advice and give advice on funding learning

How to do a mid-life development review



Currently the NCS priority groups include:

- low-skilled adults without a Level 3 qualification
- adults facing redundancy, newly redundant or distant from the labour market.

Additional help can be provided for these groups. The NCS website also has a dedicated section for older workers

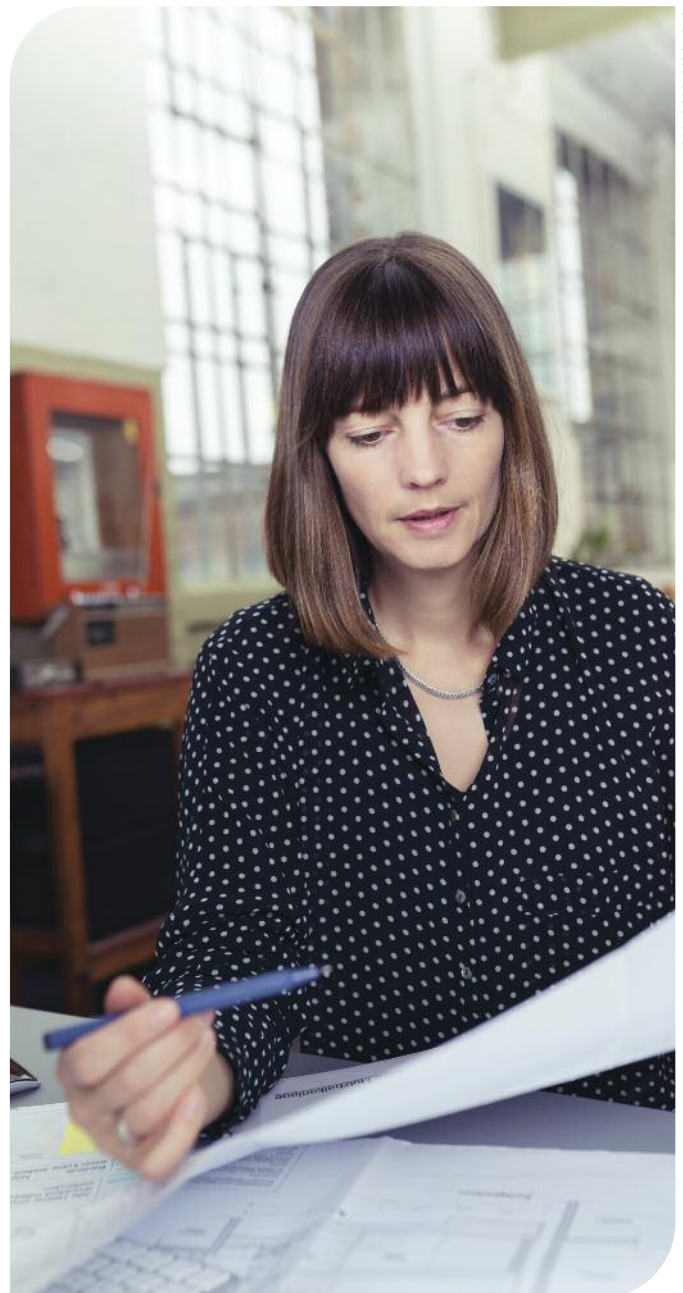
<https://nationalcareersservice.direct.gov.uk/advice/planning/Pages/olderworkers.aspx>

The National Careers Service

The National Careers Service (NCS) helps people who want to review their career, whether it is after redundancy, due to illness or disability, or just wanting to change their work/life balance. NCS advisers utilise a wide network of training providers and other partners, along with career tools to provide effective support. Career tools available on the website can help customers to gain insight into their experience, skills, motivations and interests and then to develop long-, medium- and short-term plans. This can include changing roles completely or phased changes; it could also just mean making a small change in their current role.

Often workers feel under-valued, bored or that work encroaches too much on their home life. NCS advisers can help them to think this through and aid their decision making on what the next steps are, going at their own pace and fitting in with the demands of the workplace.

Advisers can help with career guidance, learning and training, employability skills and self-employment. Sessions can be carried out on a one-to-one basis or in groups, or even via Skype, email or telephone at a time to suit the individual or their employer. There may also be the opportunity of working after hours to meet shift workers and others who are unable to meet an adviser during normal working hours. This is all free of charge.



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Quick Start!

If you only do one thing...

Try the NCS for yourself. You can contact them via their website or free telephone helpline:

<https://nationalcareersservice.direct.gov.uk>

0800 100 900

If you want to find out more about regional or local services, or to work in partnership with the NCS, you can contact them via the organisations currently subcontracted to deliver services in your area. These are:

Region	Organisation delivering NCS services
Central Eastern	Futures Advice
East Midlands	Futures Advice
Greater Manchester, Cheshire, Warrington and Staffs	Economic Solutions
Liverpool, Cumbria and Lancashire	Economic Solutions
London	Prospects Services Ltd
North East	CfBT
Thames Valley	Adviza
South Central	CXK Limited
South West	Prospects Services Ltd
West Midlands	Prospects Services Ltd
Yorkshire and Humber	Careers Yorkshire and Humber
All regions	Serco's national telephone helpline

Get the infrastructure in your workplace right

Unions have found that involving union reps in reviewing employee development works best when the groundwork has been laid for learning and skills activity in the workplace. This may involve a learning agreement, a learning committee, learning centres, trained ULRs and agreed facility time for ULRs to carry out their role. You will have learned about this in your ULR training, and may have already set up these arrangements yourself.

You may find it helpful to include mid-life development reviews and other forms of information and advice about learning opportunities in learning agreements.

Unionlearn has produced a useful guide, *Delivering Better Learning Agreements – a guide for union reps and officers*, which will help you to do this. You can download this from www.unionlearn.org.uk. The Bargaining for Skills eNote is also useful. Visit www.tuceducation.org.uk to use the eNotes, which is bite-sized e-learning for union reps.

Get your employer on board

There are many benefits for employers in supporting mid-life development reviews and different ways of creating opportunities for their staff to progress at work. Here are some of them:

- Staff will be more motivated to stay and to 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.
- It may result in reduced staff turnover, recruitment and training costs.
- The organisation can develop and grow its own talent and management.



Quick Start!

If you only do one thing...

Do a presentation about the benefits of mid-life development reviews to senior managers, line managers or the HR department. Then you can ask for time to carry out these reviews and other forms of support. They may want a mid-life review themselves. Unionlearn can help with ideas of what to include in a presentation about mid-life development reviews – contact Jane Warwick at Congress House jwarwick@tuc.org.uk or visit the Climbing Frame learning theme on Supporting Mid-Life Development to download some examples of presentations and other materials.

If your workplace is being re-structured you may be able to work together with your employer to achieve the best outcomes for everyone and to work with a specific group of workers who may have to re-think their working lives. If the situation involves redundancies, the NCS will be able to provide one-to-one and group activities to help workers to review and develop their skills and to find new jobs.

Get people in your workplace to come forward

Having a mid-life development review provides many benefits for workers:

- identifying transferable skills and knowledge
- identifying training or learning needs
- identifying new or flexible roles or promotion opportunities at work
- thinking about a career change
- considering the right time to think about retirement
- considering ways of passing on skills and knowledge to younger workers
- building confidence and motivation
- creating a personal and professional development plan
- improving IT skills through use of the Climbing Frame and other web-based resources.

You will have lots of ideas about how to engage people in your workplace, using email, posters, focus groups, newsletters, learning needs questionnaires, learning centres and courses, workplace intranets, union and partner organisation websites, social networking sites, case studies, quizzes, informal learning events like Learning at Work Day, Adult Learners Week and Celebration of Learning, bite-size or taster sessions, and, of course, talking to individuals.



Quick Start!

If you only do one thing...

Use your usual communication channels to invite people in the workplace to a short meeting about mid-life development reviews so you can find out what they want. Then ask unionlearn to come and do a briefing session to introduce activities and resources.

If you are planning to offer one-to-one interviews, you will need to think about where to carry out the reviews so that privacy and confidentiality are possible, and if you want to work on this together as a group, you will need a space to meet where there are not too many distractions.

If you need any help to plan these activities, contact your union, your regional unionlearn contact or Jane Warwick at Congress House jwarwick@tuc.org.uk



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Stage Two

One-to-one or group activities

One-to-one meetings can be the best way of approaching reviews but this doesn't mean that you can't get people together to start things off or to help each other in groups. Group sessions are often best for delivering information because you can invite specialist visitors (for example the National Careers Service or a pensions expert) or do a presentation with handouts on different topics of interest.

You can also set things up so people can review each other (this is known as peer review), working in pairs within the group. They can help each other to get started and then refer individuals to you or to a specialist for further help.

All of the processes described in this stage can be done one-to-one or in a group or at an event. Group sessions don't have to be lengthy; a lot can be achieved in a short bite-size or buzz session. You can also carry out one-to-one sessions on the telephone or by email but face-to-face is best if it can be arranged.

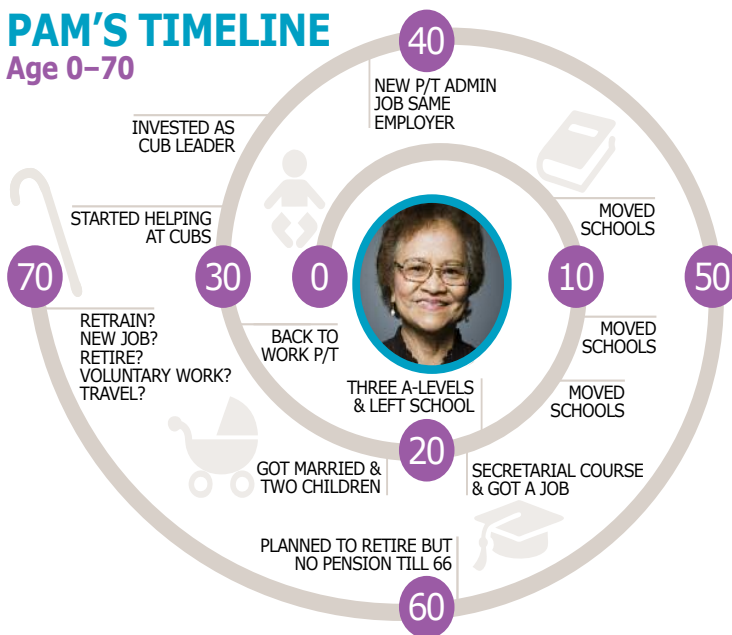
There are some tips about how to make sure that everyone can participate fully in group sessions in the unionlearn publication *Making Learning And Meetings Accessible To All* (see resources on page 35).



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PAM'S TIMELINE

Age 0–70



Making a timeline – exploring aspirations and needs

This stage of the mid-life development review is very useful in helping people think through their current situation and where they would like to be. Listening is very important, giving people as much time to talk as they need and not jumping in too quickly with information, action plans or signposting.

To help you to talk face-to-face with colleagues about personal issues, using activities such as a timeline can be useful, so that you can both look at what is on a piece of paper, rather than just at each other and have a discussion at the same time. *Value My Skills* cards can help with this process too.

How to create a timeline

- You will need some sheets of paper and pens in different colours.
- Draw a long line (straight, zig-zag or spiral, but with space to write next to it).
- Mark every 10 years from 0–80 on the line.
- Ask your colleague to fill in key transition or achievement points so far (from all parts of their life, not just paid work), talking about this as you go along.
- You can also use this activity to talk about barriers and issues that may have affected their lives.
- Then ask them to imagine the next 10–20 years and to mark in on the timeline in a different colour what they hope to be doing, what they would like to achieve, and what might get in their way.
- This can then lead to a discussion about how to achieve their goals, what information might be needed and what support.

Activity 1: Use pre-review questionnaires

These questionnaires will get people thinking about the issues that are important to them in mid-life and give you a chance to find some signposting information for them in advance.

The questionnaire may include these general areas: paid or voluntary work; finances; relationships; learning; leisure; health and well-being; spirituality and values. You can also include more specific issues relevant to your workplace.

You can design your own questionnaire or use one that unionlearn has produced. You will probably have had some practice in creating questionnaires in your initial training as a ULR.

Face-to-face

- Ask your colleagues if they see themselves being able or wanting to do their current job until retirement.
- Ask your colleague to tell you a bit more about the priorities identified in the pre-review questionnaire.
- Ask open questions and listen carefully to the answers.
- Do an exercise such as making a timeline imagining what life will be like in ten years time and thinking about what they would like to be doing.

In a group

- Offering yourself as someone wanting a review, encourage the group to ask questions which will encourage you to talk and to think about how they would respond to your answers.
- Working in pairs, offer each other a mini-review, using the face-to-face techniques above.
- If you have access to computers, all do the Buzz quiz on the icould website and discuss the results.

Resources

You can find a list of resources at the end of this guide.

ULR training offered by TUC Education or by your union covers interviewing techniques such as active listening and questioning. These skills are looked at in detail in the unionlearn *Supporting Learners Guides* and the Supporting Learners eNote, where you can see a video of bad and good one-to-one techniques. The eNote also includes an interview checklist and techniques and tips for good interviewing.

The Supporting Mid-Life Development resources section on the Climbing Frame has links to the pre-review questionnaire, the timeline activity and the buzz quiz.

Examples of open questions

Open questions are used to encourage people to talk freely about themselves, and to help them if they get stuck. Sometimes they are not questions but requests to talk about a particular aspect of life. You can follow the case study of Pam on the Supporting Mid-Life Development eNote where open questions encourage her to talk about the skills she has gained in voluntary work. Here are some examples of questions you might ask in a mid-life development review:

- If you could do anything you wanted to in the next 10 years, what would you do?
- Tell me about the things that you like doing at work and in your spare time.
- What skills have you developed at work, or in voluntary or leisure activities?
- How do you feel about using computers?
- Tell me about any other people you would need to consider in your career plans?
- Flexible working arrangements can be very helpful – what do you think about that?
- What thinking have you done about the income you will need over the next 10 years?
- Are there any factors that you need to take into account in making plans for the future, for example health issues or caring responsibilities?



Quick Start!

If you only do one thing...

Get a small group together to do mini reviews in pairs, trying out some of the resources and discussing how well they work. Then you will feel confident to offer a review to larger groups of colleagues.

Activity 2: Overcoming issues and barriers

People overcome barriers and develop strategies as they go through life and become more experienced in work. Some are internal barriers, such as lack of confidence, others external, such as lack of transport. At mid-life, these may be different, and include financial issues, caring responsibilities, ill health, and lack of IT skills to take on new roles. These may all need to be addressed before someone can progress and may be an initial part of an action plan. Your ULR training may have covered problem-solving and recognising and overcoming barriers to learning – this will be helpful to you in delivering mid-life development reviews.

One-to-one

- The pre-review questionnaire will have helped to identify and prioritise issues which may be barriers – discuss these in more detail.
- Use the Overcoming Barriers resource sheet which you can download from the Climbing Frame to discuss barriers to progression at work. The timeline activity can also help.
- Identify barriers where specialist help may be needed so that you can signpost people to that help.

In a group

- Continue the activity with you as the person having the review – ask the group to identify barriers by asking you questions, then to work in pairs to come up with some suggestions about how to overcome them and feed them back to you and the rest of the group.
- Use the Overcoming Barriers resource sheet, or some case studies from your own union, to start a discussion in pairs about participants own experience and methods/resources for overcoming these common barriers.
- Interview each other in pairs about issues and barriers and discuss ways of overcoming them.

Resources

You can find a list of resources at the end of this guide.

- The Overcoming Barriers resource sheet can be downloaded from the Climbing Frame.
- Your ULR training may have included an activity on overcoming barriers.
- The unionlearn publication *Breaking through the Barriers* is about equal access to learning for all and has some inspiring case studies.



The Value My Skills cards (see next page) are a great tool for helping people assess their abilities and plan future goals.



Quick Start!

If you only do one thing...

Make a list of the key issues you think people in your workplace face at mid-life and note what you as a ULR can do to help. This might just be signposting but this is a very important part of your role.

Activity 3: Identifying transferable skills

Identifying transferable skills is an important process at any stage of a career. This means skills which may be learnt in one situation and used in another. Everyone has a range of skills learned in training, at work, in voluntary and leisure activities and in the home. ULRs also develop a range of transferable skills in carrying out their role.

People often find it difficult to find the right words to describe their skills, so this process can give them a lot of confidence. This process can form the basis of writing a winning CV or application form and covering letter when applying for jobs, promotions, courses or other opportunities.

One-to-one

- Use the *Value My Skills* cards and recording sheet as suggested in the pack, or the App, and discuss which skills your colleague would like to use, and how learning opportunities can help to develop new skills.

- If you have access to a computer and the internet, work through the NCS Skills Health Check tool, and talk about the results.
- Talk about what evidence your colleague has of their competence to include in a CV or application for a job, a course or a promotion.

In a group

- Split the group into pairs to use the *Value my Skills* Cards and the recording sheet, organising the time so everyone can have a turn – you could start the activity off by showing the film, on the unionlearn website, about the use of these cards in the North West.
- Invite the NCS or other expert to run a CV building session (if this is hard to arrange you can find advice about CVs on the NCS website and also on the Climbing Frame, in the Personal Development and Career Planning learning theme, so you can design your own activity).
- Ask each member of the group to talk about the way they use one skill they have identified while using the cards.



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Resources

You can find resources and where to find them listed at the end of this guide.

- Look at the section about transferable skills on the Supporting Mid-Life Development eNote, and follow the case study about Pam and the transferable skills she has gained in voluntary work.
- Order the *Value My Skills* cards from unionlearn and download the recording sheet.
- NCS Skills Health Check.
- Download the two skills checklists from the Climbing Frame Supporting Mid-Life Development learning theme – one about transferable skills gained in Higher Education and one about the skills developed in supporting learners as a ULR.



Quick Start!

If you only do one thing...

Order the *Value My Skills* cards from unionlearn and try them out with a small group of colleagues, working in pairs to start off with.

How to use the *Value My Skills* cards

1. Find a large table or space to lay the cards out. Then lay out the four headings, Very Competent, Competent, Adequate and Undeveloped. Arrange the skills cards under the four headings.
2. Consider the Very Competent and Competent columns. Think about which skills you actually like using or want to transfer to another context. Put these key transferable skills in a separate pile and record them. You may be very good at things that you have never enjoyed doing.
3. Then have a look at the Adequate and Undeveloped columns and decide which of these you would actually like to develop or need to improve in order to reach your short- and long-term goals.
4. If you are thinking about a complete career change or your retirement, you may want to think about the cards in terms of their categories: Data, Ideas, People and Things, to see which opportunities you would like to focus on.
5. You can then record this information if you wish to. There is a checklist available to download from the Climbing Frame Supporting Mid-Life Development learning theme and some other linked resources. You will then have the basis of a skills action plan for the immediate or long-term future, and words to describe your skills and aptitudes to an employer or a course provider. If you add evidence of how you have used these skills, you will have a winning CV.

Use the new free *Value My Skills* App

If you prefer to do this activity using your smartphone or tablet, a new App is being developed and will shortly be available. To ensure you are kept up-to-date about this new resource, register on the unionlearn website.

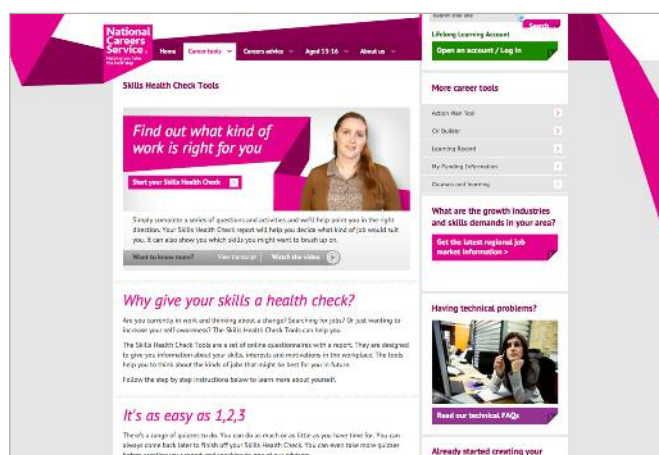
NCS Skills Health Check

This is a set of activities that you can encourage other workers to try online. They can open a free Lifelong Learning Account to record the results of this and other activities. This is how it is described on the NCS website:

“Are you currently in work and thinking about a change? Searching for jobs? Or just wanting to increase your self-awareness? The Skills Health Check Tools can help you.

“The Skills Health Check Tools are a set of online questionnaires with a report. They are designed to give you information about your skills, interests and motivations in the workplace. The tools help you to think about the kinds of jobs that might be best for you in future.

“There’s a range of quizzes to do. You can do as much or as little as you have time for. You can always come back later to finish off your Skills Health Check. You can even take more quizzes before creating your report and speaking to one of our advisers.”



Activity 4: Providing information and getting specialist support

For every stage in a career, different information will be needed. For the mid-life review it may be about finance, pensions, learning opportunities, redundancy support, health or disability or career change. Information changes all the time and should always be checked to make sure that it is current and relevant to the individual and their situation. ULRs can help people to become more confident about finding information for themselves and “signpost” them to sources of information they may not have been aware of.

Life can be as complicated at mid-life as it is on leaving full-time education or at the time of full retirement. It is important that ULRs do not try to give information or solve problems for people themselves unless they are sure they have the expertise. A range of specialists and regularly updated websites exist to help with finance, health, career planning and other issues; many of these are free services. ULRs have an important role in referring people to specialists and in helping them to coordinate all the different aspects of making a career action plan.

One-to-one

- If you have access to a computer and the internet, help your colleague to find specialist information on websites – there are a lot of suggestions on the Supporting Mid-Life Development learning theme on the Climbing Frame or in the resource list at the end of this guide.
- If your colleague is confident about doing some research, signpost them to local, regional or national organisations that have current information.
- If you don’t know something, offer to find out. If you prefer telephone or face-to-face rather than using the internet, many organisations have free telephone helplines or local offices where you can book an appointment (e.g. NCS, CAB).

In a group

- Invite a specialist to give a talk or run a workshop on CV writing or pensions, for example.
- If you are confident, give a presentation yourself on where to find information on particular topics.
- Have a group discussion so that all group members can talk about organisations or websites they have found useful.

Resources

You can find a list of resources at the end of this guide.

- The Supporting Mid-Life Development learning theme on the Climbing Frame has links to a range of organisations.
- The resources section of this guide includes useful websites.
- The NIACE (National Institute for Adult and Continuing Education) Mid-Life Career Review project website has links to a range of organisations.

Activity 5: Action planning

ULRs can help people to make an action plan, both for short and long-term goals. The process of setting goals, action planning and recording achievement is empowering and builds confidence.

You can support colleagues by:

- helping to identify long- and short-term goals – these may be personal, to do with current work or long-term career or about learning
- deciding what actions will be needed to reach those goals and putting them in order of priority
- breaking the actions down into small manageable steps
- identifying what information or support will be needed to complete each step
- including a timescale and arranging a review date
- helping to record the plan.



Quick Start!

If you only do one thing...

Visit the Climbing Frame and select the Supporting Mid-Life Development learning theme, or use the resources page at the end of this guide and follow the links to the websites to see what information you can find.



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Recording an action plan

There are lots of ways to record an action plan:

- a written list on paper
- on large sheets of paper using different coloured post-its for actions, information needed and support needed
- as a mind-map
- on the union learning Climbing Frame
- by completing a National Careers Service Skills Action Plan online, by telephone or face-to-face with an adviser.



Quick Start!

If you only do one thing...

Try producing a simple action plan for yourself using one of the methods suggested here.

One-to-one

- Talk the action plan through using post-its and flip chart paper to record things so that you can move them around, change the order and add new ideas.
- Talk it through using the Climbing Frame to record goals and actions and also to look up sources of information and support.
- Signpost to the NCS and go online to use the Skills Action Plan or to use the telephone helpline or book an appointment.

In a group

- Use post-its and flip chart paper in small groups – take it in turn to create action plans and all contribute ideas.
- Work in pairs to help each other, then come back together to pool ideas on information and support.

Resources

You can find resources and where to find them listed at the end of this guide.

- The union learning Climbing Frame
- The National Careers Service Skills Action Plan
- The Supporting Learners and Supporting Mid-Life Development eNotes include action planning.



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Stage Three

Reviewing, follow-up and support

Individual support

A mid-life development review should be an ongoing process in order to be effective. People may need a lot of time to think things through and to progress their plans. One of the most important things ULRs can provide is continuing support in the workplace, including opportunities for reviewing action plans regularly. This can be an informal activity.

The Climbing Frame includes ways of recording action plans and goals that have been achieved. Recognising and celebrating achievements, however small, can build confidence and encourage people to take the next steps.

Mentoring and coaching

Mentoring and coaching activities will help to build confidence, to keep motivation going and review the success of carrying out planned actions. Some unions have trained groups of ULRs in mentoring and coaching skills. Many of the one-to-one skills you have developed as a ULR are the basic skills of mentoring and coaching but you may wish to signpost or refer colleagues to a trained person for this kind of support.

The role of a mentor is to help people to take advantage of opportunities, overcome obstacles in the learning process and apply that learning in the workplace.

Mentoring involves:

- giving time and quality attention to the people you are supporting
- providing a long-term focus to their personal and professional development
- helping them to diagnose and analyse problems for themselves
- providing them with constructive feedback
- being prepared to share past mistakes and lessons learned
- raising the profile of the person you are supporting where possible and looking for potential learning and development opportunities for them.

Mentoring skills include active listening, questioning, building rapport and giving constructive feedback.



The role of a coach is to bring out the best in people, giving support and encouragement, building confidence and self-esteem, passing on skills, knowledge and expertise and helping with personal and professional development.

A coach is a sounding board, a facilitator, an awareness-raiser and a listener; but not an instructor, an expert adviser, or a problem solver. Coaching can be formal or informal.

Coaching skills include building trust and rapport, listening and asking questions, acting as a role model, sharing ideas about learning and

How to do a mid-life development review

experiences, providing information and feedback, encouraging people to reach their potential and helping with goal setting and development planning.



Quick Start!

If you only do one thing...

Download a post-review questionnaire from the Climbing Frame and try it out with colleagues who have had a review. This can be useful for the individual to help them to see how far their thinking has progressed. It can also create a valuable record for you, your union and unionlearn about the issues, concerns and action plans of older workers. Some people may be willing to provide information for a case study to inspire other workers to come forward and have a review.

Making the case to employers

If employers are engaged in the process, you may need to keep a dialogue going about providing time off for training, considering new approaches to flexible working, succession planning for the older workforce, and providing support for learning in the workplace. ULRs may also be able to support individuals to make a case for support to carry out their plans in their current workplace.

You can get some ideas from the Bargaining for Skills eNote and Climbing Frame learning theme. Download *Making The Case For Learning* on the unionlearn website.

Your own development

Once you have engaged with other workers in this way, you will probably want to do more reviews. The benefits to the rep and the union are very rewarding:

- Reach people who may never have had help in planning their career or their learning.
- Help them and their families to plan for the future.
- Help them to become more confident in making decisions about learning and work.
- Help them to engage with their employer.
- Work in partnership with the NCS and other organisations.
- Gain experience in using the Climbing Frame and other online tools to support learners.

If it interests you, you can search for courses and qualifications on information, advice and guidance, coaching and mentoring, counselling or tutoring. These will enable you to give more in-depth help and support to other workers. Contact the National Careers Service to find the right learning opportunity for you: Call free from a landline on 0800 100 900 or visit <https://nationalcareersservice.direct.gov.uk>



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Resources

Resources to help you with every stage of the mid-life development review process can be found in the Supporting Mid-Life Development learning theme at <https://climbingframe.unionlearn.org.uk>

They include:

- How to order the *Value My Skills* cards
- A mid-life quiz
- Pre-review questionnaire
- Post-review questionnaire
- Overcoming barriers resource sheet
- Guide to registering people on the Climbing Frame
- Links to eNotes
- ULR transferable skills sheet
- The Age and Employment Network (TAEN) *Challenging Age Guide*
- *50+Works: a guide for older jobseekers* (TAEN)

Other resources for supporting learners can be ordered or downloaded from www.unionlearn.org.uk, including:

- *Supporting Learners – guides for union reps* (2013 edition) www.unionlearn.org.uk/publications/supporting-learners-packs
- *Delivering Better Learning Agreements – a guide for union reps and officers* www.unionlearn.org.uk/publications/delivering-better-learning-agreements-guide-union-reps-and-officers
- *Making Learning and Meetings Accessible to All* www.unionlearn.org.uk/publications/making-learning-and-meetings-accessible-all
- *Working for Learners* (third edition 2011) <https://www.unionlearn.org.uk/publications/working-learners>
- Climbing Frame App – Download it today from the Apple Apps store or Google Play Store (search for Climbing Frame)

To receive latest news and publications from unionlearn sign up and register on the unionlearn website www.unionlearn.org.uk

Your union may also have a range of resources to support you in this role.

Useful websites to help with mid-life development reviews are:

Unionlearn www.unionlearn.org.uk

Union learning Climbing Frame
<https://climbingframe.unionlearn.org.uk>

NIACE Mid-life Career Review Resources
<http://www.xtlearn.net/p/mlcr>

The Age and Employment Network (TAEN)
www.taen.org.uk

Download the pdf of *50+ Works: A guide for older jobseekers* http://taen.org.uk/uploads/resources/50+Works_Older_Jobseekers_Guide_Web_Version.pdf

The National Careers Service (NCS)
<https://nationalcareersservice.direct.gov.uk>

The Buzz Quiz <http://icould.com/buzz>

Fifty Plus Works www.50plusworks.com

TUC Worksmart www.worksmart.org.uk

PRIME (The Prince's Initiative for Mature Enterprise)
www.prime.org.uk

Gov.UK www.gov.uk

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