NICEC

National Institute for Careers Education and Counselling

Career management skills and the older workforce

A report for the Ufi Charitable Trust

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Acknowledgements

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Why the 'older workforce' matters

1. The National Audit Office (NAO) estimated in 2004 that the relatively lower level of employment among older workers costs the economy £19 - 31 billion a year in lost output and taxes and increased welfare payments. For many older workers, this can contribute to poverty, insecurity and social exclusion. By contrast, employers could stand to benefit from the reliability of older workers, which can lead to lower staff turnover, greater productivity and the retention of skills in the workforce.

2. Demographic change means that larger age cohorts are now within or approaching the decades which typically mark the end of working life. Increases in life expectancy and delayed morbidity mean that for many people there will be an extended period of active retirement. Research shows that a managed retirement process enhances physical, mental and financial well-being in later years.

Career management skills – definitions and explanations

3. The focus of career management skills is upon competence in making and implementing decisions that determine one's career, while the focus of personal and employability skills is upon the competences used within the positions that one enters <u>as a result</u> of decisions and transitions.[1] The literature review on career management skills finds relatively little literature that is specific to older people. Across all age ranges, career management skills are located in a broad arena also occupied by both employability skills and transferable skills, but career management skills are recognised to be different from, though related to, both these sets of skills.

4. Within the existing literature on career management skills for young people and all adults, not just older ones, there is a common consensus that career management skills fall into three broad sub-sets:

    -   Self knowledge and personal management
    -   Learning and work exploration
    -   Skills for managing transitions and life-work balance.

    These subsets provide the framework for careers education guidelines issued by SCAA[2] in 1995, and for the current curriculum guidelines for careers education and guidance (DfES[3]). The same framework is evident in the international work on a Blueprint for Life/Work Designs, originating in the
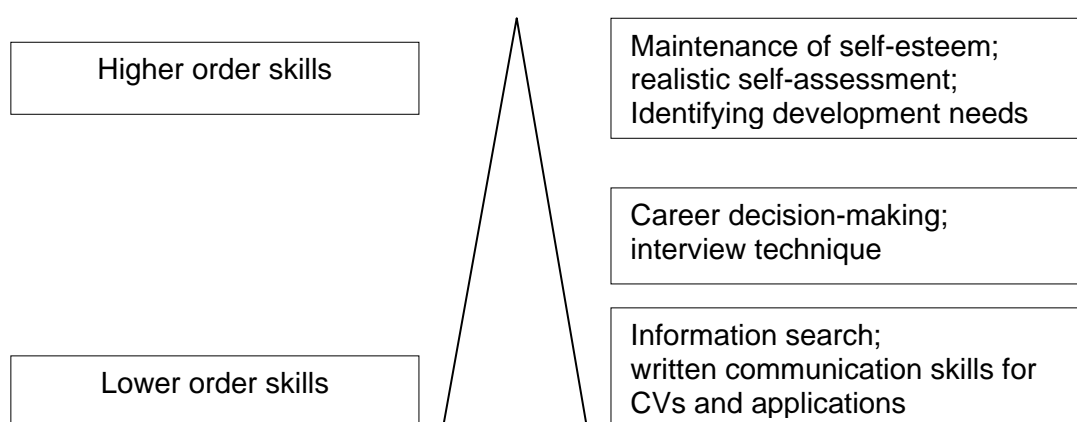
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[1] Watts & Hawthorn (1997) Careers education and the curriculum in higher education. NICEC project report
[2] School Curriculum and Assessment Authority (1995) Looking Forward: Careers Education and Guidance in the Curriculum
[3] DfES (2003) Careers Education and Guidance in England: a national framework 11-18

USA, and developed in Canada[4], and later adopted in Australia as ABCD: Australian Blueprint for Career Development.

5. The notable exception to this framing of the thinking about career management skills is the exploration by Ball[5] of the career management skills needed by new graduates. He identifies processes relating to *making career choices and decisions*, as an iterative and cyclical process, *managing the organisational career*, with a strong involvement of the employing organisation, *managing 'boundaryless' careers*, and *taking control of one's personal development*

6. Ball raises the important question of whether all career management skills enjoy equal status. He proposes the possibility of a hierarchy:

Higher order skills		Maintenance of self-esteem; realistic self-assessment; Identifying development needs
		Career decision-making; interview technique
Lower order skills		Information search; written communication skills for CVs and applications

Ball's question is relevant to the nature and the impact of support offered to older workers, and will provide a useful dimension for analysing respondents' accounts of what has been helpful and what difficulties prove more intractable.

7. Whilst both the three-part SCAA and Blueprint models, and Ball's model for career management may have relevance for the older workforce, none offers a comprehensive framework for exploring what is uniquely happening for older people. The project management group considered the analogy of a journey including air travel. At the early stages, the traveller prepares for the journey, moves to the airport and finally 'takes off': the period of early career development frequently characterised by ambition and upward intent. Having set course and travelled some distance, attention is turned to the process of 'coming in to land'. The later stage of the flight might include gradual or rapid descent, before the final landing and completion of the journey to the destination (or full retirement from work-related activity).

8. This analogy helped to situate the specific issues that arise for older people, in contrast to the existing models for career management skills which are all firmly positioned and then articulated in detail which addresses the early

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[4] www.blueprint4life.ca

[5] Ball, B. (1997). The career management skills required by graduates in a changing labour market. Unpublished CMS evaluation paper.

stages of career development. The oldest age group anticipated by the Australian Blueprint, for example, is adults in mid-career, compared with the 50 to 70 year age span of this study. Existing models contain a strong emphasis on growth, improvement, exploration and developing understanding, in a context where career enhancement is seen as a largely unquestioned aim. The models relate to people who are assumed to be somewhat ambitious, and, in terms of the life stages of Super's (1953) developmental model of career, they resonate well with the stages of growth, exploration and establishment. This is understandable as much career provision has its conceptual roots in the early stages of the individual's career and the learning and work choices which are required.

9. The older workers who have been respondents for this project have been characterised by a desire for balance and enrichment of life experiences, rather than attitudes of ambition in the workplace (but see the caveat about our sample, in the fieldwork section). When people are in the earlier stages of career, much energy and attention is focused on tasks relating to building work identity and laying the ground for achievement and financial reward. By the later stages of working life, this appears to be replaced by a belief that there is more to life than work, and a greater unwillingness to compromise core values, especially those related to family. As retirement appears on the horizon, and the option of a life-space which does not include work as a core requirement is acknowledged, many people question what proportion of their time and energy they wish to devote to employment, and what level of compromise they are prepared to make between personal values and work expectations. Time becomes a very precious commodity, and money is not always an adequate compensation for 'lost' time.

10. These shifts in personal values and priorities are the context in which we address the research questions of whether, and in what ways, career management skills are different for older people. The demographic changes, and changes in public policy about pension provision, provide the wider context which makes these questions both important and timely.

Methodology

Fieldwork

11. Fieldwork was planned to be based on agencies working with older people. This inevitably meant that most, possibly all, would be unemployed people or those facing employment problems. This has resulted in respondents exhibiting a higher rate of health problems and of previous employment in sectors subject to structural employment change than might be typical of the population aged 50 – 70 years in general. However, it should be emphasised here, as elsewhere, that the unique situations and experiences of our respondents far outweighed any generalisations that can be made about the age group.

Nextstep

12. *Nextstep Cornwall and Devon* invested time and resources in creating a day when the researcher had access to a range of relevant clients, and staff themselves attended and developed their own interaction with their client group.

13. *Nextstep Hertfordshire* created introductions to a range of clients and to agencies who were able both to host researchers for this work and to introduce further research respondents. They particularly made efforts to contact a number of individual older people who had recently been assisted in a redundancy programme.

14. *Nextstep Greater Manchester* also introduced network members who were willing to provide facilities and to introduce appropriate clients for this research.

Third age specialist agencies

15. We sought these agencies through The Age Employment Network. Some years ago, such agencies were numerous and widespread. Changes to funding regimes have drastically reduced their number, so that only two specialist agencies were identified in England. Only one of these fell within the three geographical areas originally agreed for the project, and this particular agency chanced to have staffing problems that delayed their participation until December 2008. Another specialist project, in the south-west but outside our original target area, became involved at a later stage, and we interviewed two current users and one past user of their services.

16. In other locations, some recruitment of respondents took place through targeted provision in generalist agencies. An example is the interaction with participants in the Golden Mouse computer training project (age 55 plus) located in Hertfordshire within a learndirect centre which also offers nextstep services.

Jobcentre Plus

17. Many of the respondents identified through other agencies were also users of Jobcentre Plus services, and one site in Devon was specifically working under contract with JCP to provide extended services to unemployed people

How did we conduct interviews?

18. The initial review of the literature had not provided any models of career management skills that appeared applicable to the age and stage of life that interested us. The research team worked together to develop an interview methodology that enabled us to explore people's experiences without any preconceived schemes for how we would explain their 'stories'. In each interview we invited the respondent to give a summary of their current situation. Then we asked them to explain the last ten years or so, and the career events that had led up to their current situations. Finally we invited them to look ahead for the coming few years, and to share their hopes, intentions and fears. Throughout the interviews we used a prompt question of 'How is that different from being younger?'. This is careful wording to allow the respondent the choice whether they compared with themselves when younger or with young people now. The discussion guide is provided as an annex to this report.

The sample

19. In total, we interviewed seventeen people, nine female and eight male. They range in age from 49 to 61 years, with all but two (both women aged 61 years) being under state pension age. We also talked to seven advisers in the agencies which introduced us to our participants. In most cases the advisers had worked directly with the clients who were our interview respondents. All interviews were audio-recorded, and typically lasted between 45 minutes and an hour.

Analysis

20. Analysis was undertaken by one researcher listening to and making detailed notes of each recorded conversation. Analysis was based loosely on a grounded theory approach, used in a 'light touch' mode of looking for 'critical instances' – things that were particularly emphasised by individuals or issues that recurred across a number of 'stories'. The issues emerging where then considered to explore whether they represented a common theme across a number of cases. They were also explored in relation to explanations within the literature relating to older people and to careers at a mature life-stage.

21. At this stage it became obvious that the detailed breakdown of the three broad sub-sets of career management skills, as elaborated, for example, in the Blueprint for Life/Work Design, did not capture some of the more important issues that our respondents were raising. In particular, the various three-part models, although all sound in some part, were not broken down in a way that

captured the situation, and the necessary career management skills, of people who had moved from a stage of striving into one of settling, where ambition is largely (though not for all people) replaced by a concern with evaluating various life priorities. This report therefore uses the three broad categories of the three-part models, but does not utilise any of the more detailed analysis of these categories which has been undertaken in relation to younger people.

AREA A: SELF KNOWLEDGE AND PERSONAL MANAGEMENT

22. Almost all aspects that arise in this section are double-sided: there is a clear positive gain from maturity, linked with a negative one in relation to the labour market.

23. Older people know much about their own capabilities, interests and values, drawing such knowledge not only from work but from a wide range of roles, including – crucially – parenting, as well as their social and community involvements. On the downside, they often have difficulty articulating such self-knowledge in a way that makes it relevant to the workplace and job-seeking. Individuals talk of their difficulty in tailoring this knowledge to the questions on application forms or to targeted CVs, and practitioners describe major inputs to helping people identify, value and 'sell' such non-accredited capability. For the individual, this is often common-sense capability: 'Everyone needs to do that', and therefore not quite worthy of highlighting in an application for work.

24. Many respondents were able to detail ways in which they had extended a core work role into much wider involvement: through trade union activity, through professional associations and associated roles (an example is a hotelier also acting as a hotel inspector) or through the demands of self-employment or being involved in developing a small company. They are aware of having 'used their brain' in ways that were immediately apparent to the researcher, but harder to sell to an employer, especially when they needed to be succinctly articulated in written format.

    Implications: Advisers need to ensure they offer help in analysing skills and attitudes developed in 'extended roles', and conveying these in job applications. Identifying and articulating the skills developed through past actions is not an easy task for those who have not needed to do it for many years. Tailoring the identified skills to match specific job requirements is challenging even for those who are experienced in job search.

25. Confidence is not a simple issue. Some people have drawn a distinction between confidence in their capacity for work (which may be high) and confidence 'in themselves' which becomes an issue in selling oneself to a potential employer. Respondents confirm what is already well-documented: that confidence suffers as a result of job loss, and is further eroded by periods of unemployment and by lack of success in job-seeking. There is a recognised potential to slide into depression, and activity is acknowledged to be the best antidote to this. Depression is a complex issue, beyond the scope of the project, but findings here reflect the accepted picture of causes and responses. Practitioners address these issues by encouraging activity in learning, volunteering or employment; both local and 'distance' advisers recognise the value of detailed local knowledge in their efforts to help people over thresholds and into unfamiliar activities.

    Implications: Distance advisers need mechanisms to refer to or tap into local knowledge. Referral may not always be an easy option with someone

who is depressed, so a close working alliance between 'distance' and local advisers is needed.

26. Respondents sometimes related confidence to brashness, particularly when talking about themselves when younger, or young people now. There is a sense of younger people being prepared to overstate capabilities whereas older people are more honest and more inclined to be realistic. Some people (respondents and advisers) considered that employers are more accustomed now to an 'over-sell' approach, and older people are selling themselves short in this climate. However this unwillingness to conform to employers' expectations may relate to a more deep-seated disconnect between individuals and employing organisations. Some respondents were able to articulate profound concerns about the nature of current-day employment. At one level, this took the form of references to 'Macjobs'; at another level, a respondent whose previous senior management role had included involvement with recruitment explained that 'you never got fired for hiring a 35 year old with a mortgage and two kids'. The pressure to perform and conform ensured a high level of work commitment. For himself, now 51 and with several months of unsuccessful job-seeking, he comments that people will know he has 'a few quid in the bank' and will not be so driven and motivated.

27. For this man, in common with many older people, 'growth' is evidenced by a desire to re-evaluate priorities, and undertake activity that is more congenial than that which seemed necessary during the decades when financial responsibilities and pressures were significant. This complex definition of 'growth' includes a growing certainty of what is of most value in life, and a growing reluctance to be tractable to the underlying messages of the workplace about compliance (regardless of their own values) and 'advancement', sometimes in pursuit of goals that have little meaning for the individual worker. People want to do something that they are good at, where they can have a sense of achievement, and where work is 'on their terms', at least to the extent of recognising that they are able to make judgements and take pride in performing well.

    Implications: *For advisers whose outcome measures place high emphasis on placement rates, current pressures lead to encouragement to job-seekers to adapt to market conditions. As these policy measures begin to shift, to incorporate job retention measures, suitability of placement becomes a more significant issue, as it is already for those who are free of these specific outcome constraints, and are able to focus directly on the client's best interests.*

28. A number of people had built a particular status or identity for themselves within an organisation, perhaps over a long period of time. Two people described a past workplace as being 'like a family', and another described her role in supporting the build-up of a firm from two people to a significant size, at which point it was taken over. Her commitment to the firm's success was reciprocated by considerable flexibility in hours for her to manage her family life. In all these cases people felt recognised for their individual contribution, characteristics and achievement. Their interactions had been positive and

valued, but were found to be situation-specific and extremely difficult to recreate elsewhere.

29. 'Time' was also raised as an issue by some respondents. Age brings a growing awareness that time is not infinite. A particular feature is that older people are reluctant to have their time wasted, either by inactivity, or by activities which do not have a perceived value in the eyes of the worker. One respondent, starting a new job where the promised training did not materialise and she was left with little to do (albeit on a good rate of pay) commented that she 'had better things to do at home', as she explained why she left the job.

30. Fundamental questions about identity are raised as people switch the balance of their attention away from job roles and towards their own needs, with the prospect of full retirement visible on the horizon. Whilst work identity may typically have had greatest salience for men, it is also important for some women, especially those who gained much of their sense of identity through work: a hotel proprietor and a graphic designer (both female) come to mind. In a society where the question 'What do you do?' (using an activity verb) Is typically understood to need the answer 'I am a teacher/electrician/accountant' (using a designation of identity), the loss of a work role can place the individual's sense of identity at risk (as, perhaps, Alice shows: see below). Some older people have made use of the term 'retired' as a socially acceptable descriptor; as the discussion progressed, their real desire for a working role emerged. For comparatively younger people, those in their early to mid-50s, this is not a comfortable solution, as 'retired' suggests aspects of an age identity which they are understandably not yet ready to adopt.

31. One man felt sufficiently pressured by this identity issue that he adjusted his behaviour so as not to be visibly at home during 'working hours', thus keeping his unemployment from being obvious to neighbours. He compared his own situation, at age 51 and redundant from the age-sensitive IT industry, with that of a neighbour, a medical consultant who at 65 years is respected for his experience and is being wooed to remain in work beyond state pension age. These two examples illustrate again the diversity of experience and need amongst this age group. The literature review for this project makes reference to work on the diverse characteristics of older workers, identifying categories such as 'choosers', 'jugglers', and 'survivors'[6]. Each has different needs and preoccupations, as well as various gendered issues about work place attachment.

> *Implications*: Use of such easy-to-understand typologies could support exploration of the diverse characteristics and needs of older people, and could usefully be incorporated into development activities for advisers. This would extend their own thinking, and also offer a potential tool for discussion with their clients, as a way of helping them identify aspects of their own situation and development needs.

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[6] Flynn, M. & McNair, S. (2004) CROW Briefing note 1 at http://www.niace.org.uk/crow/publications.htm

32. Individuals and practitioners in our sample recognised that 'striving' is largely replaced by a preference for settling into a comfort zone, a tendency which increases markedly as people progress towards and through their 60s. [A comfort zone should not be equated with lack of activity; many people have very busy and satisfying lives within their families and wider communities.] Aspects of routine were greatly valued by many older people, and some practitioners commented on older people's unwillingness to change routines in order to adapt to, for example, the timetable of a learning opportunity, even when the routine under question was an apparently flexible one, such as shopping. This study raises questions about the extent to which routine and identity are interrelated. With the loss of the personal identity and descriptors that arise from work roles, some sense of security and belonging may be replaced through community activities, routines and familiar practices.

> *Implications*: *Some advisers are comfortable addressing issues of self-esteem and realistic self-assessment as 'higher order' career management skills (see paragraph 6). Others are less ready to venture into this ground, but it is of considerable importance for their clients.*

33. There is evidence that women are commonly better able to manage the adjustment to non-work through their social contacts and the support derived from them[7]. Severe isolation and depression more commonly afflict men, but even in the small sample of this study, a number of people challenge these stereotypes.

Alice
The only person amongst the respondents who reported treatment for mental ill-health was a woman. Financially secure through the income of her husband who works away from home for extended periods, she had trained and worked in learning support roles, and expressed strong motivation for helping others. After a lengthy period of unsuccessful job search, with many applications not even acknowledged, she found herself asking 'Do I exist?'. Her recovery is being helped by involvement with learning support activities on a voluntary basis, but her job search now suffers from both her age (52 years) and her health record, despite her self-perception as 'a bubbly person'.

George
George, also 52, challenges the stereotypes of male-ness by his satisfaction in fulfilling a caring role for his wife. Previously the area manger for twelve units of an organisation with customer service outlets, he decided his increasing dissatisfaction with the pressures of his management role could be replaced by the satisfaction of offering a higher level of care for his wife, who has a progressive disability. Having put his financial affairs in good order before resigning his management post, he had assumed that he would find a part-time job near home to supplement their savings. After two years of unsuccessful job search, he describes

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[7] DfES (2003) Challenging Age (p.25)

himself as 'relaxed': gaining great reward from his wife being happier, despite her deteriorating condition, and now used to managing with a level of frugality which he hopes will see the savings pot eked out until state retirement age.

34. Practitioners noted a tendency for older people to expect more hierarchical work structures. They differ from young people in being much less willing to ask for help from anyone whom they perceive to be senior, perhaps through deference to hierarchy, or perhaps through fear of drawing attention to any suggestion of age or incompetence that might increase their risk of redundancy or job loss. For people whose work role had largely been in manufacturing at shop-floor level, this included a view of all office-related work as 'posh', a barrier which practitioners themselves needed to work hard to overcome, in winning the trust of their clients.

35. Older people in this study frequently showed a distinctive attitude to the psychological contract of work – the unwritten code of how the relationship between employer and employee should operate. Underpinning this for many employees is a sense of fairness: a commitment on their side to pull their weight, which should be reciprocated by respect and fair treatment from the employer. This significantly inhibits many older people from taking a job just for the pay, with one person articulating that 'it is not fair to the employer to take a job that you know you will hate'.

36. There is no easy generalisation to be made about older people and their interactions with others. Some become more assertive with age, others more mellow.

37. Both older people themselves and career practitioners are caught between a desire for quality work opportunities on the one hand, and on the other hand policy agendas which are broadly based on an assumption that culpability for unemployment rests with the individual. Our respondents lamented the enormous pool of talent going to waste, in parallel with expressing fears of being bundled into 'shelf-filling' jobs. On the evidence of this small sample, there is a greater need for policy pressure to be applied to employers than to older unemployed people.

AREA B: LEARNING AND WORK EXPLORATION

Accessing learning

38. Not surprisingly, those with higher academic qualifications were more likely to have engaged with formal learning opportunities, and were more willing to continue to do so – this association is born out by successive studies of adult learners. For others, practitioners identified specific actions to address concerns and misunderstandings:
    - raising awareness of how the delivery of learning has changed, and emphasising flexible delivery methods
    - emphasising training structured around competence rather then time-serving
    - the value of offering detailed and personal descriptions of the place and the people, as a considerable help in encouraging a first step into learning provision (with distance advisers acknowledging their limitations in this, and the value of local services with local knowledge)
    - offering reassurance that learning was suited to their age and stage.

39. Despite the above, several respondents had found considerable difficulty in obtaining a level of initial assessment that allowed them to enrol for learning that built on from existing knowledge (particularly with computer skills) rather than taking a standard package. One respondent passed several modules of a standard programme before her training provider closed. As she could not find an alternative that would allow her to progress rather than repeating what she had already done, she discontinued rather than go through this demeaning process. Assessment for basic skills provision is now generally quite sophisticated but other areas appear to have scope for development in this respect.

40. People were also mystified by regulations: one person started two learndirect courses, then was arbitrarily removed from one with the information that 'you cannot do two courses at the same time'. It was not apparent to her why not (and from her perspective, clearly she <u>could</u> do two courses).

41. People had difficulty obtaining information on the value, particularly the work relevance, of specific learning opportunities and on the progression routes.

    Implications: These points suggest a significant role for advisers in advocacy with training providers about the need for individualised assessment at entry and flexible provision. They need to work in partnership with training providers in making progression routes more clearly understandable to individuals.

42. Those with limited formal learning were aware that they had learnt: 'I must have learnt because I knew how to do things.' Another commented on the wealth of information 'in my head and in my life'. A pervasive issue in considering career management skills is helping people to find ways of understanding, interpreting and conveying to others the skills and capabilities developed through life experience. This confirms the view that 'qualifications

are a poor proxy for skills' for older people[8] and is developed more fully in the following section, on seeking work.

> ***Implications***: *Advisers need to be aware of the loose relationship between formal qualification and actual work skills, and use this both in direct support that they offer to their clients, and in advocacy on their behalf, especially with employers.*

43. Several people had undertaken short certificated courses whilst in employment. Those at more senior level were aware of the need to assemble this information into their CV, but those with limited exposure to training were less sure of the labour-market value of such certificates and of how to claim credit for the achievement they represent.

44. Practitioners mention a proportion of older people who do not want to bother with training, or comment that it is too late. This attitude was not evident among our respondents, but its absence may be explained by our accessing our sample through agencies which encourage learning.

Seeking work

45. It is important to recognise that our respondents in this research reflect the lived experience of labour market change. Every personal story could be located within both the structural change and the occupational change of the last few decades. An exemplar is the 57 year old graphic designer, trained largely with pen and paintbrush, willing to learn computer systems but at each step outpaced by young graduates with modern design ideas and experience with new software. Over time she had been able to retain employment by skill in older techniques which became niche markets until finally they lost out to market pressures. She found further employment after three redundancies, but has been unable to find work since the fourth redundancy, four years ago.

46. The respondents to our research have shown an unwillingness to leave a known and congenial type of work. This raises a question about our sampling, through helping agencies, and the lack of involvement with those in employment, who perhaps have been more flexible and adaptable in acknowledging the realities of labour market change.

47. Respondents have all expressed an understanding of labour market change, at least at the level of mass media comment, and have been able to relate this to their own situation. Such understanding does not necessarily remove the stigma of unemployment, or the feeling that it is somehow their own fault.

48. All respondents had a desire to make a contribution to society and their community, although many felt that benefit-related pressure to work actually restricted valuable contributions that they were making in voluntary and community settings. At the core of the concern for each individual was how to make a contribution in a way that also gave them a sense of achievement.

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[8] McNair, S. (2007) Presentation at the CRAC conference Decisions at 48.

Allied with this is a consciousness of the quite extended period of time (ten or more years for many) during which they could be pushed into personally demeaning work. Acknowledgement that they 'should be working' did not mean that they should be treated without respect for what they could offer.

49. The need for a CV is new for many who have not changed job for some while. In general, people who had been in touch with a support agency felt that they had received extensive assistance that had really helped, not just in producing an end product, but in understanding processes and purpose.

50. Many older people feel out-of-touch with how the job application market works, and when anything unusual happens, they internalise blame. The lack of replies from employers exacerbates this; one well-qualified respondent had submitted 35 applications but received only two acknowledgements. 'I must be doing something wrong' was probably the most commonly heard opinion in this research.

51. Practitioners recognise these points, and expend effort on explaining systems and providing reassurance. One practitioner emphasised that the CV preparation is only the start of the story. She uses mock interviews to carry the learning from the CV process into a wider arena, describing how she moves answers to 'Tell me a bit about yourself' away from 'I am 59 and I'm unemployed' and towards 'I have had a successful career in … and now I'm looking for …'. Most respondents comment that job applications and interviews are not uniquely difficult for older people; they hated them when they were younger too. However the unwillingness to oversell and the anticipation of age stereotyping create greater hurdles with advancing age.

   Implications: *Support for applications and interviews needs to sensitive to the needs of older people. Encouraging 'over-sell' will often not be comfortable for them, but positive action such as that in the preceding paragraph will be helpful to many older people.*

52. On-line application procedures cause real problems for older people, as highlighted in the companion study on ICT skills. At one level, the process of creating a CV had helped people understand that they needed to target specific skills to the job requirements, but they lacked confidence and skill in doing this; at another level, the management of an on-line form was unfamiliar and few had confidence that they had followed the proper procedures for safe delivery. The lack of any feedback from many employers exacerbates the uncertainty. As one-off events, these are harder for helping agencies to support, but greater attention to underlying principles and some practice would be helpful.

   Implications: *More support in this specific task will show benefits in people's overall skill and confidence in completing application procedures of all kinds. However, it is inevitably time-consuming, and is a particularly difficult task for distance advisers who are not able to undertake this in a 'shoulder-to-shoulder' style with clients.*

53. Jobcentre Plus vacancy information is not available to a minority of older people who are unwilling to use touch-screen technologies in case of appearing incompetent in public, who do not have internet access elsewhere, and who are reluctant to use the telephone. Older people are often more comfortable with local newspapers as a source of vacancy information. A written format gives a chance to think about an employer and decide on action, but some people have commented that there is a declining flow of advertisements in local papers. Some job advertisements are handled through specific routes or agencies (local authority vacancies in education and care seem to be an example) which may not be immediately obvious to those new to jobsearch.

> *Implications: Advisers should give targeted help on where to find relevant vacancy information locally, through all available media, and offer appropriate support in accessing it. In some cases peers and volunteers may be able to help, but local variation of advertisement sources make this another aspect that is more difficult for distance advisers.*

54. Many respondents have referred to changes in the ways in which employment agencies work. In the past, agencies offered a way of creating flexibility, through taking temporary jobs and taking a break, for example to cover school holidays. Agencies were seen as being more personal in the past, evidenced by knowledge of the individual and the work they had done well. Good workers would have received preferential treatment for new vacancies. Agencies are now described as being much less personal, and frequently operating on a first-come, first-served basis rather than making any attempt to fit the applicant to the opportunity. Agency staff are often young, and not well aware of the issues affecting the older workforce.

55. One respondent explored the idea that employers are more likely to conduct an interview with a younger person against a broad canvas of how they might progress and contribute to the organisation over time. With an older worker (even with a decade of working life to come) they are more likely to interview for the specific post. This creates a mindset which limits the extent to which an older person can sell their all-round skills and the value of their life experience. If typical, this reinforces the view that, despite the age discrimination legislation, subtle forms of discrimination still remain.

56. Voluntary work offered considerably more scope for setting one's own levels of commitment, in an area of personal preference. Whilst it was seen by the individual as valuable in gaining experience which would be relevant to paid employment, those who were trying to make this transfer were finding this a difficult message to convey to employers. In relation to voluntary work one practitioner warns of the overtones of the term 'volunteering', and found that in some social settings 'helping out …' is more acceptable terminology. This has implication both for how lower-skilled workers may convey their voluntary work to employers, and also for the ways that agencies may promote volunteering to some parts of the workforce.

AREA C: LIFE/WORK BUILDING

57. The Blueprint for Life/Work Design relates this section largely to the understanding of work within the wider economy and the well-being of society at large. Interestingly, the Blueprint has no references to earnings and personal financial well-being. This becomes a key issue for older people, as their career management is tightly interrelated with income levels, and, for some, with pension planning.

'Who do you want to be now?'

58. This title, from a paper by Hawthorn[9], addresses many of the higher order skills of career management as proposed by Ball (above, paragraph 6). The literature review for this project had shown a number of ways in which people have typically changed, compared with early stages of career, in terms of their values, their family and community involvement, and the priority accorded to career advancement and financial reward.

59. People have moved from a situation where, as a young person, work was central to their social life, to one where family and friends, and familiar, elective activities have higher priority. This particularly applies where the main job reward has been extrinsic, and life satisfactions have been found elsewhere. As one practitioner reports, older people think it is time to 'give yourself a break' and acknowledge that 'life's too short'. Another practitioner mentioned the desire by older people to be recognised for their life experience and certainly not to be 'shouted at'.

60. Practitioners comment on older people becoming more cautious and less impulsive, and particularly in being aware of the impact of their decisions on others. Personal fulfilment at work might be traded against greater good for other family members.

61. Almost all the people we interviewed were seeking to resolve questions of competing priorities, values and meaning within their own life.

> Janet, a former teacher who left because of unsatisfactory work conditions, and then coped with a period of caring, bereavement and personal ill-health, comments at age 55 that 'time is going on'. Although financially secure through her husband, she explores tentative ideas for work activities, wanting to find a 'real sense of satisfaction, something fulfilling, achievement', and emphasises that this is 'from inside, more for myself than others'.

> Paul, discovering painfully at 51 that the IT industry may be an ageist area of employment, is now looking more broadly. Advised long ago by his school that computer science would make good use of his Maths ability,

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[9] Hawthorn, R. (2008) Who do you want to be now? Over fifties re-entering the labour market. *Career Research and Development, the NICEC Journal.* No19, Winter 2008

he now feels that he has never really made any big career decisions. He wants to 'put something back into society' but without a 'road to Damascus' moment, cannot work out what that might be or how to tackle the decision.

62. The practitioners we spoke to fell into three broad groupings in relation to how they handled these bigger issues with their clients. About a third addressed such issues, comfortably ranging across life-span and life-space experiences, and effectively working with the 'who do you want to be now?' question. Another group were aware that these questions existed, but had few personal strategies for helping people address them. The final group restricted their level of activity and perceived responsibility to the 'nuts and bolts' issues of CVs and application forms. Clients' views on their advisers broadly reflected these distinctions; they were always grateful, even for the more limited help, but some knew that more would be beneficial. It is important to note that the more extensive help was, with one exception, in the remaining specialist agencies. We can only surmise whether it was widespread in such agencies when they did exist, and recognise that there is a risk that a very significant area of expertise may have been largely lost.

> *Implications: All agencies need to consider ways to provide such help to their clients, though we have to acknowledge that it is an area of advanced professional skill which needs team support, and several of our adviser respondents were somewhat isolated in their professional role. At a policy level, it is a key issue to consider in the design of the new Adult Advancement and Career Service.*

63. The greatest fear for older unemployed people is that they will be forced into uncongenial, low-pay, low-skill jobs, where they will be financially no better off than on benefits. One respondent pointed out that while some firms have signed up to the government strategy of offering jobs to older people, this may be restricted only to certain categories of jobs – not the ones that she might want.

Retirement as a managed process and not an imposed event

64. The literature review for this project found considerable interest in viewing retirement as a process over a period of years, rather than a simple event, moving the debate to 'how' to retire, rather than 'when' to retire. The emphasis is on individual choice, and support for that choice. Associated with this is clear evidence that those who have control over the retirement process have a more satisfactory older age.

65. Most of our interview respondents were not at all in control of such processes. We need firstly to acknowledge that our sample, drawn from those using advisory services, will be skewed in this respect. However, all of them were either subject to benefit regulations which forced them into active job-seeking and might require them to take far-from-ideal jobs, or were in forced inactivity which might turn into de facto early retirement through their inability to find

work. In our interviews, we asked people to look ahead at plans, hopes and fears for the coming years. The only respondents who talked specifically about retirement were those who saw achievement of State Pension Age as a way out of their current difficulties.

Mary, aged 57 and unemployed since a redundancy four years ago, is now relieved that she will still qualify for a pension at age 60. Currently, travel costs mean that she would probably be worse off than on benefits if she were forced to leave her voluntary work and take a 'minimum wage' job (despite being a graduate). Once she receives her pension in just over two years' time, she can take part-time work and be financially more comfortable than she is now.

None showed the kind of planful thought patterns recommended in the literature, although we can speculate that it is likely that such planning would be more common amongst those in relatively secure and rewarding employment.

66. Concepts of helping their clients through a 'retirement zone' were also almost completely absent from our discussions with advisers, who referred to retirement as an 'event', and largely considered it in financial terms (pension income) rather than in lifestyle terms.

Implications: There is considerable scope for, and advantage to be gained from, developing practice to reflect the idea of retirement as a managed process. There will be problems: it is remarkably difficult to draw together information on pension entitlements and benefit regulations into an arena where work options can also be discussed. Many guidance practitioners will be reluctant to engage with such important and specialised financial information. But it is not impossible; the co-location of a welfare rights advice service and careers advice in one Age Concern project suggest a way of tapping both areas of expertise for an individual client. The imminent pilot of a government-backed national 'money guidance' service[10] alongside the development of the new Adult Advancement and Careers Service offers an opportunity for similar co-operation on a wider geographical scale.

Age stereotyping and discrimination

67. The Blueprint for Life/Work Designs includes reference to personal action to combat stereotyping as a career management skill. The Blueprint wording suggests that stereotyping is an issue to be addressed and overcome, whereas both practitioners and older people engaged in our research suggest that age stereotyping has some difference from that based on gender or disability, for example.

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[10] A Guardian newspaper article gives details at
http://www.guardian.co.uk/money/2008/mar/03/familyfinance.debt

68. Practitioners agree that age stereotyping is a constant issue, and would probably question the capacity for themselves and their clients to make proper inroads against such pervasive but subtle attitudes. However practitioners also feel that it is sometimes used by individuals as an excuse to save face. Practitioners working at a distance by telephone found it particularly difficult to judge when this might be a real issue and when it might be masking other problems in accessing opportunities.

69. A key issue, as detailed earlier, in combating stereotyping is identifying, valuing and conveying the applicability of transferable skills. This is not an easy issue. A former manager who 'is used to being in control', may need to understand her potential impact on an employer and rephrase this to 'being used to being responsible'. The ubiquitous phrase 'I'm used to using my brain' may need to become more specific in terms of being a 'problem-solver'. There is a crucial career management skill at the communication interface between applicant and employer, in conveying the value to the organisation of life-wide skills in terms which show how they can add value to the organisation. A feeling of success in doing this can greatly enhance the confidence of the older job applicant.

70. Whilst the preceding paragraphs suggest that there is some action that can be taken by advisers and individuals, the overwhelming sense is that employers in general have done little that addresses systemic discrimination within their existing workforce or in relation to recruitment practices. It is difficult to see that the legislation which became effective in 2006 has yet had any real impact, but removal of a number of the supporting services for individuals, including targeted services funded by Jobcentre Plus and the funding for specialist 'third age' agencies, has reduced the potential advocacy for older workers at local levels.

71. There was extensive discussion by our respondents, reflecting the same concern in the literature, of a huge waste of talent and resource in the unemployed older workforce. This ranged from the personal level, a waste of their own potential for contribution and for the financial and social rewards of work, to a view that the government should establish a mechanism for older people to join a 'skills bank' thus making themselves available to work on projects as well as in formal employment. One person argued cogently that this could reduce the government's own high spending on consultants.

> *Implications*: *These paragraphs raise significant policy questions, both about effective enforcement of the legislation and about the provision of support that is properly sensitive to the needs of older people and able to provide advocacy on their behalf.*

Career management skills and finance

72. Older people are prepared to trade much in financial terms in order to stay true to their values and preferences. Compromise takes on complex meanings. Financial hardship is better than a 'no-brain' job. Several respondents commented that pay was a larger incentive when they were

young – money to go out, for socialising and for enjoyment. A few made reference to the financial pressures of mortgages, children and household responsibilities, but none referred to having overwhelming financial difficulty at the stage in life when these pressures would have been greatest. Now pay was secondary to having a congenial lifestyle.

73. Some people speculated about whether very high extrinsic reward (pay) would be a sufficient motivator to undertake an uncongenial job. While it might be for short periods, it is anyway only perceived as an option that is available to younger people. Respondents thought that the characteristics of such jobs (hours, travel, uncongenial surroundings) mean that employers would be unlikely to consider older people for them even if the person were keen.

74. Despite an unwillingness to compromise and take very unsatisfying work, respondents commonly expressed the view that they 'should be working'. For some people, careful eking out of financial resources to state pension age was better than poorly paid employment. Several people expressed doubts about the validity of 'better off in work calculations', especially when they factored in for themselves travel costs, higher band council tax, and the loss of the household savings that can be made if you have time. People expressed frustration about not getting clear interpretations of benefit rules, including hours of work and types of benefit. Where decisions are finely balanced between the rewards and costs of taking a job, clarity is essential but often lacking. This frustrates sensible decision-making.

   Implications*: Although promoted as helpful by government agencies, 'better off in work' calculations have not won the confidence of some benefit claimants. Detailed consideration is beyond the scope of this study, but it is an area where the new Adult Advancement and Careers Service may have an important interface with Jobcentre Plus.*

75. For some, income levels have been almost incidental. One respondent described his (professional level) career as 'almost like a hobby', while another manufacturing worker chose to stay in a workplace which she described as being 'like a family' although it was clear that higher pay was available elsewhere. Indeed, when forced by redundancy to make a job change, she would not stay in an alternative better-paid job where she did not feel well-treated.

76. Older manual workers in this study describe a very functional view of work to earn money, but they value their work as 'real work' (as opposed to office and service jobs without a visible product) and take pride in it, despite according other work a higher social status. As manufacturing opportunities decline, this produces psychological barriers to alternative forms of work.

77. In general, respondents conveyed themselves as being products of a thrifty war-time and post-war period when saving rather than borrowing was the way to meet needs. Some also convey a feeling that reward (wage levels) should follow performance rather than being demanded up-front, thus positioning themselves in ways that may impact on the salary they are able to achieve.

Others were able to articulate the value of their life experience, and the level of reward that it should earn.

> *Implications: Where people are in financially tight circumstances moving from benefits to work, the ability and confidence to articulate issues relating to pay may be important, and not currently well addressed. Advisers may be able to offer more help in doing so.*

Health issues

78. Although significant health issues will affect a minority of older people before state pension age, health played some part in the career situation of the majority of our respondents. Back problems, joints and heart conditions were key issues. Underlying the health problems was a frequently expressed concern that health was not predictable. People talked about having 'good days and bad days'. This relates to the issues raised in paragraph 35 about honesty in their dealings with employers, and concern about fulfilling their side of the psychological contract, as well as concern that pushing themselves could exacerbate the health issue.

79. Concern was expressed about general stamina, particularly by those who had been out of full-time work for some period of time, and perceived themselves to be unused to the rigours of full-time work compared with those without a break in employment. However even those at the younger end of our age range (for example Paul, featured earlier) reported that stamina was now an issue, at least at an elective level.

80. Conversely, health was also seen as being positively affected by engagement in work and learning. Most of our respondents wanted to keep active and were not ready to define themselves as 'old age pensioners' even when over the state pension age. Some people reported that they had tackled and overcome health issues, and others were in the process of doing so. This was largely a personal issue and not one which people could see a way of selling to an employer.

> *Implications: Key issues for practitioners were the limited time that they could spend with any individual, and the targeting of services to less qualified people, when labour market conditions and/or health issues may dislocated many older people with higher qualifications. These concerns need to be carried forward in the design of the new Adult Advancement and Careers Service.*

Conclusions

81. This report paints a picture of older people facing challenges and hurdles in finding satisfying employment. Whilst it is essential to plan services in ways which recognise the unique characteristics of each person and their situation, there are some generalisations about older people which should be borne in mind.

    i.   Life experience, of which work is only one aspect, will have led to the development of wide-ranging knowledge and varied skills, only a small part of which is likely to be formally accredited. This will apply for those with higher educational qualifications as well as those with few formal qualifications.
    ii. The transition into retirement should be managed by the individual to suit their personal circumstances in relation to health, finance, occupation(s) and their family and social relationships. Evidence is clear that control over this transition has a significant impact on well-being in later life.

82. Many of the challenges faced by older people seeking work arise through factors which are beyond their personal control, and contribute to the loss of their productive participation in the workforce. In relation to employment and the workforce:

    i.   Age discrimination, although now illegal, is widely perceived to continue to operate in many subtle forms.
    ii. Unemployed people in this age group represent a huge pool of underutilised talent. As successive cohorts with higher qualifications reach this age band, the waste becomes even more significant.
    iii. This study produces evidence that high-tech, high-skill, 'modern' industries place high value on their younger workforce, and may shed well-qualified older workers, who have the same difficulties finding alternative work as their less well qualified peers.

Recommendations

83. These recommendations are largely drawn from the sections headed 'Implications' throughout the report. They are grouped here in relation to policy issues, to extending understanding of the situation of older people, and to the competence of advisers.

Policy

i.   Developments in policy should be based on an understanding of retirement from employment as a 'process' over time, not an 'event'.
ii. The needs of older people, and the development of appropriate services to meet their needs will be better served through specialist agencies, or specialist teams within generalist services.
iii. There is a need for better links between financial advisory and planning services and career services in order to support individuals in planning their steps through the 'process' of retirement. This stretches well beyond benefits

advice, and should include links both with welfare rights advice (largely in the voluntary sector) and the proposed 'money guidance service'.

iv. Employers should be challenged to explore constructively the specific contributions that older workers may make to their organisation. The literature review reports that the 'specific efficiency of older people' correlates well with employers' stated needs. There is a need for quality opportunities through which people can contribute in social and economic terms.

v. The shift of performance measures to job retention (long-term) rather than job placement (short-term) will encourage better attention to the real needs of older people.

Understanding the needs of older people
This set of recommendations focuses on the needs of older people, which should inform and underpin the design of services to meet their needs.

vi. It is helpful to recognise a general shift towards lower work centrality for many older people, but also to be aware that this is not universal. Some people choose to 'ease up', but others remain strongly committed to an existing or a new career, while a proportion of women will relish the chance to experience work achievement and financial independence.

vii. It is essential to recognise diversity as the key characteristic of people in the later part of their working life. Work commitment, financial status and intentions, social and health issues will all vary, and will shift for each individual over the two decades from 50 to 70 years.

viii. Older people have extensive skills and knowledge gained from many aspects of their lives, much of which cannot be evidenced through qualifications. They greatly benefit from support in identifying, valuing and articulating their capabilities.

Adviser competence
It is important to develop and support of advisers undertaking challenging work with older people.

ix. Staff development should encourage and extend the existing skills in supporting basic job-seeking, including preparing CVs and completing applications forms on paper and on-line.

x. More extensive staff development is needed to enable advisers to engage with their clients on 'big questions' which underpin value-based career choice, and decisions about the part that learning and work (including voluntary work) play within people's lives.

xi. Staff would benefit from training which promotes understanding of the many differing and shifting characteristics and ambitions of older people, both within work and in voluntary, learning and leisure activity. Confidence to discuss types and typologies will enable staff to expand their discussions with older people to address life decisions more holistically.

xii. Similarly, there is value in training that explores the concept of retirement as a process, not an event, and considers the issues that arise from managing lengthy transitions; such training should also touch upon the subsequent long-term benefits for older people arising from the active management of their own retirement process.

xiii. There is a place for the development of skill and confidence to undertake advocacy for older people, both with employers and with learning providers.

xiv. Both job-seeking support (item 9) and advocacy (item 13) will be enhanced by increased understanding of ways of identifying skills (notably 'soft skills') and experiential, uncertificated learning. Once such skills and knowledge are identified, they need to be matched against job and learning opportunities. The process of recognising skills and knowledge will also be beneficial in work directly with clients, contributing to bolstering their confidence in their own capabilities.

xv. Staff development to explore the strengths and limitations of both distance and face-to-face working will benefit staff in both settings. Increased understanding will enhance co-operation, referrals, and exchange of information about opportunities. It should be a longer-term aim to provide joint training as part of the development of the Adult Advancement and Careers Service.

xvi. Professional development is enhanced through peer support, rather than isolated working. All these recommendations argue the case for work with older people to have specialist status within the Adult Advancement and Careers Service, through specialist locations or teams. Such arrangements also allow specialist staff to anticipate and respond to changes in the demographic profile of successive cohorts of older people, including the increase in the proportion with higher level qualifications and skills.

CAREER MANAGEMENT SKILLS - DISCUSSION TOPIC GRID

To be used in any appropriate order, and full coverage is not essential, depending on individual situations.

	Age	Gender	Health	Finance	Care responsibilities	Family and domestic	Rural/urban	Ethnicity and first language	Used advice/help?
PERSONAL									
ACTIVITIES	Employed full-time	Employed part-time	Self-employed (extent?)	Voluntary (extent?)	Community involvement	U/e claimant	U/e incapacity	Retired	
LEARNING	Formal full-time		Formal part-time		Informal learning		Work-based learning	Highest qualification	

25

Discussion stages

1. An invitation to outline their current position in relation to learning and work.	This might lead to prompts about other items in the Activity line.	
2. An invitation to review recent 'stages' in their life.	Were any stages difficult? What did they do about it? Were any stages particularly rewarding or satisfying?	How was that different from being younger? Younger? How was that different from being younger?
3. What do they anticipate might be the next stages in their life?	What will they be doing about that? What difficulties might they anticipate? How might they seek help? Are any things easier now than when you were younger?	How is that different from being younger? Younger? Younger?
4. Does their state of health and well-being have any impact on their choice of activity?	Are they needing any help in working through health and well-being issues in relation to activities?	How is that different from being younger?
5. Does their financial status have much impact on choices for coming stages?	Are they needing any help in working through finance issues in relation to activities?	How is that different from being younger?
6. Review the grid and cover any missing areas, as appropriate to this discussion.		

NOTES

1. A key theme is how 'career management' now is different from
   a) for themselves when younger
   b) young people now.

   These are very different issues, since the world has changed a lot since they (we) were young. I've carefully phrased the question 'How was/is that different from being younger?' so that it can be interpreted either way, because people will choose to answer it in the way that seems most important to them. It will be immediately obvious which interpretation they are using. Either (or both) is useful in our analysis.

2. The key purpose of the interview is to obtain as recorded material the responses and discussion around these topics. We are not asking respondents to analyse for us in any depth their own view of 'career management skills for the older workforce', but to share their experiences, and their feelings of success and anxiety – and whatever else comes out. It is then the task within the analysis of the recorded material to use this to
   a) confirm findings from the literature
   b) expand and illuminate earlier findings
   c) add to and extend earlier findings
   d) question and challenge earlier findings.

3. Other than the third column, these topics are phrased towards the researcher, and need to be suitably worded to suit the respondent and the conversation to date.