

**Am I still needed?**



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# **Am I still needed?**

**Guidance and learning for older adults**

**Summary of report published by University of Derby,  
Institute of Guidance Studies, 2005**

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# Contents

<b>1 Ten key points</b>	1
<b>2 Report summary</b>	4
<b>3 Key recommendations</b>	12
‘Joined-up’ government strategies	12
Reaching out to and involving older age groups	13
Employment and the workplace	14
The skills agenda and lifelong learning	15
Guidance services	17
<b>References</b>	21



# 1 Ten key points

Full report published by University of Derby, Centre for Guidance Studies, 2005.

- 1 Governments and communities throughout the developed world, and including the UK, have not yet fully appreciated the severity of the economic and social challenges that current demographic changes present to the future stability and well-being of their economies and communities. Policy decisions tend to be reactive and concerned principally with pensions issues and retaining older workers for longer in their present jobs, rather than proactively identifying and implementing strategies that can unlock older people's potential.
- 2 The four countries of the UK each require an overarching and 'joined-up' national third age strategy, which seeks to harness and develop the skills, abilities, experience and potential of older adults and utilise these for the benefit of the national economy, local communities and older individuals themselves. Lifelong learning and career/life guidance should be seen as essential elements of these strategies, so that older people themselves are fully engaged in the strategies and the emphasis is clearly on the utilisation and development of their individual skills and potential.
- 3 The third age strategies should each be integral to the four national skills strategies, and should recognise the economic and social importance of equipping people with the skills they require for good citizenship and the voluntary sector, as well as for the formal economy and paid work. Many older employed and unemployed adults are disadvantaged on grounds of age, irrespective of level of previous qualifications; skills training strategies should therefore not be restricted to those who have not yet attained level 2 qualifications, although the needs of the less well qualified should be seen as paramount.
- 4 'Lifelong learning' should be genuinely lifelong and readily accessible to older age groups. There is a national shortage of opportunities for older adults to retrain and upskill; however, occupational training opportunities need to be counterbalanced with courses that help older people to understand current social, demographic, economic and other developments within society, prepare for 'active retirement' and improve their quality of life through non-vocational provision.
- 5 Many more local outreach guidance and learning initiatives that reach out to the 'hidden unemployed' are required, including to the many older adults who are on incapacity benefit (many as a direct result of unemployment) and also those who have retired early and want to work but have given up hope after constant rejection.

- 6 Many older adults want to continue working, but also want a change of direction, for reasons that include: the development of new interests; the awareness of previously underutilised potential; changes in personal values; and consciousness that time is running out if they are to achieve their personal ambitions and objectives. Simultaneously, many older adults want to retire from their current place of work (but not to stop working) because they find aspects of work, including unsupportive and impersonal management approaches and conditions in the workplace, increasingly uncongenial. There are profound issues here for Government, economy, employers, guidance and learning providers, and older individuals themselves, which require concentrated research and attention to ensure that older adults are able to maximise their contributions to work and the national economy.
- 7 Training and lifelong learning programmes and career development support strategies need to be much more widely available in the workplace and open to all age groups irrespective of occupational status. Every effort should be made at local and national level to help employers, including small and medium-size employers, to understand the relationships that link training, lifelong learning and career development support with higher staff motivation and efficiency, and therefore with increased company productivity and profitability.
- 8 The processes and objectives of career guidance, and its key role in helping to realise economic and social policy, are insufficiently understood by Government and senior policy makers – and especially so in England. This is threatening the continuity of guidance provision, and therefore the ability of individuals to relate options and opportunities to their own situations and requirements. Policy makers are also at risk of losing an important mechanism to receive feedback on the requirements of communities and individuals, including the barriers faced by many older adults in accessing work and learning. Front-line feedback is needed to inform policy making and ensure its effectiveness and relevance.
- 9 Older people welcome high-quality guidance. Services they identify as being particularly helpful are highly personalised and people-focused initiatives that combine a range of guidance activities into an integrated service. In most instances, the initiatives offer clients opportunities to learn from the same site. However, 'same-site' services are often difficult to organise and resource, and comprehensive career, learning and life guidance services for older adults delivered through local networks – such as the 'Stage Posts' system proposed by the National Institute of Adult Continuing Education (NIACE) – should also be given serious consideration.

10 Mechanisms that facilitate the ready exchange of experience on lifelong learning, skills training and career guidance and enable the four nations to learn from and build on each other's good practice, including good practice in work with older age groups, are required in the UK. On current evidence, England has much to learn from the developments taking place in Scotland, Wales and Northern Ireland.

# 2 Report summary

## Preface

The Preface affirms that current demographic changes are creating a situation for the UK and much of the developed world for which there are no known precedents. There is a need for a paradigm change in policy thinking and decision making in order to cope constructively and successfully with the immense economic and social challenges posed by the ageing of the population and the declining birth rate. Areas of policy key to the issues caused by demographic change include: training, retraining and lifelong learning; working practices and attitudes towards third age working; social and individual attitudes towards ageing; and the extent to which nations and communities are prepared to develop co-ordinated strategies that nurture, develop and utilise the skills, experience and potential of older people. The report argues that current policy relating to older adults is essentially piecemeal and reactive in nature, and sees older adults mainly as passive consumers of state services. The need is for carefully considered policy decisions that are part of an overarching and 'joined-up' national strategy aimed at proactively involving many more adults aged 50+ as active contributors to the national economy and to their local communities. High-quality lifelong learning and guidance provision are essential elements.

## Section 1 The economic, social and individual dimensions of third age under-employment

Arguably, older adults have been more severely affected than other age groups by globalisation. This section uses facts and figures to illustrate: the huge economic, social and human wastage caused by third age unemployment and under-employment; and the immense benefits for the national economy, local communities and individuals that can result from harnessing the skills, experience and potential of people aged 45+ and ensuring that they are fully utilised.

## Section 2 Career guidance: what is needed

In England in particular, 'career guidance' is frequently misunderstood by the general public and, crucially in terms of national policy development, by policy makers as well. This section defines career guidance and shows why the activities of career guidance are so important in helping people of all ages, and at any point in their lives, to make education, training and occupational choices, and to manage their careers. The report shows how the multifarious activities of guidance have become distorted by their division into 'information', 'advice' and 'guidance' (IAG), an administrative device in England introduced for funding purposes. Using recent research, the report identifies those activities of guidance that older adults find

particularly valuable in helping them to: assess and reorientate their lives; overcome personal and structural barriers; regain confidence; re-establish personal direction; and optimise their contributions to the economy and their communities. Guidance services that older adults find particularly helpful are mainly highly personalised and people-focused initiatives that combine a range of guidance and learning activities into an integrated service. Critically important activities of guidance that are often underestimated or overlooked by policy makers are: the role that front-line guidance workers can play in informing policy by providing 'grassroots' feedback to policy makers on (for example) local labour market factors, gaps in learning provision, and structural and individual barriers to progression including those that affect older adults; and advocacy to employers and other bodies on behalf of individuals, and groups of individuals, to enable them to work and learn.

The report outlines key findings from recent policy reviews of career guidance in 37 countries, conducted by the OECD, European Commission and World Bank. Career guidance for older adults is a major gap in provision in many of the countries visited. A recent Resolution of the Council of the European Union on guidance policy in member states (Council of the European Union, 2004) identifies older adults as being particularly affected by sectoral restructuring.

### **Section 3 Career guidance provision**

A number of key government reports have stressed the centrality of career guidance within the UK government lifelong learning and skills strategies, although only one of these – the Scottish lifelong learning strategy report, *Life through Learning, Learning through Life* (Scottish Executive, 2003), highlights the importance of lifelong learning and guidance for older age groups. Section 3 reviews UK career guidance provision for older adults in relation to main provider organisations, most of which provide guidance to all adult age groups and a significant number to young people as well. The organisations considered are as follows.

- *Jobcentre Plus* – which is the biggest provider of information, advice and guidance in the UK, although this is often unrecognised by management and staff. Jobcentre Plus also provides, or is developing, more initiatives to assist older adults, and especially so for those with limited or no qualifications, than the vast majority of helping agencies. Some of the initiatives are outlined in the report. In common with other employment services internationally, Jobcentre Plus has difficulty in balancing its 'policing' role to reduce unemployment and pay benefits with the provision of genuinely client-centred services. Staff often do not have sufficient time to listen to the needs of clients and are frequently under intense pressure to meet targets. Feedback from older clients shows that they

react negatively to staff who appear concerned principally with organisational agenda. Significant numbers of older adults may reject Jobcentre Plus services as a consequence and join the hidden unemployed. Many 50+ are also concerned about the six-month eligibility condition for entry to Jobcentre Plus programmes and pressures from staff to take jobs that clients may consider unsuitable. Many older clients want help to retrain and reskill for jobs that interest them. The report considers the recommendations of the National Employment Panel (NEP, 2004) *Welfare to Workforce Development* in terms of services for the 50+. The recommendations of the National Employment Panel (NEP) have been broadly accepted by Jobcentre Plus, and could do much to provide management and staff with the flexibility they require to work more closely with other local partners, and to tailor provision to meet individual requirements.

- *The Pensions Service* – which is pivotally placed to disseminate information and advice in suitable formats on the local and national options (including paid work, learning and volunteering) available for older adults approaching or reaching ‘retirement’ (state pension) age. The information should include local sources of help and advice, and would therefore need to be prepared locally by the appropriate agencies.
- *State-funded guidance services* – which differ markedly in structure between the four ‘home nations’. The report describes the all-age guidance services established in: Scotland (Careers Scotland); Wales (Careers Wales); and the Department for Education and Learning’s strategy in Northern Ireland to strengthen the relationship between the all-age Careers Service, which is the responsibility of the Employment Service and the well-established Educational Guidance Service for Adults (EGSA). In contrast, career guidance in England is divided at age 20 between Connexions (age up to 19) and 47 Information, Advice and Guidance Partnerships (age 20+), and is no longer perceived by important forces in Government to be a specialist professional service. The report outlines the new structure for IAG Partnerships and identifies potential strengths, including: the simplification of access to IAG through the national learndirect helpline and web site; the establishment of a National Resource Centre of high-quality career resource materials available to the public and providers; and the appointment of local IAG Boards, which can act as a conduit to regional and national policy-making bodies on local learning, skills developments, guidance and labour-market requirements. These developments are in the interests of many older adults. However, concern is expressed that the policy of excluding adults who have achieved level 2 qualifications from ‘advice’ and ‘guidance’ provision could further disadvantage many adults aged 50+ who are already severely disadvantaged on age grounds alone, irrespective of their level of

qualifications. Many older adults do not have the financial resources to pay for private guidance provision and, at present, this is not readily available in many geographical areas.

The divided and fragmented services in England are seen to compare poorly with the all-age services in Scotland, Wales and Northern Ireland where Government has been prepared to build on the existing foundations. Mechanisms are required that facilitate the exchange of experience and good practice between guidance providers in England, Scotland, Wales and Northern Ireland, including experience and good practice relevant to career guidance for those aged 50+. Current moves to establish national and international guidance forums are therefore in the interests of older age groups.

- *E-guidance* – which includes use of: email; chat; text messaging; on-line discussion; e-learning; web sites; videoconferencing; on-line diagnostic interest and skills inventories; psychometric tests; databases of work, learning and volunteering opportunities; on-line labour market information (LMI); and guides on such areas as CV preparation and job search. E-guidance has much to offer older adults, provided they have crossed the ‘digital divide’. However, e-guidance should not be seen as a substitute for more personal guidance methods. Many older adults, for a variety of reasons, also want to discuss their own situation with experienced and highly skilled guidance practitioners.
- *Information and helplines* – experience shows that these can provide valuable assistance to older adults wanting information and advice on learning and work, provided they are targeted specifically at older age groups or people aged 45/50+ know that their enquiries are welcomed.
- *Third age specialist agencies* – a number of specialist projects have been developed during the past decade to provide guidance and learning services to older adults and help them obtain suitable work. Research shows that a number of these have proved successful and older adults have welcomed their services. However, the number of third age targeted initiatives has declined in recent years, because of their dependence on short-term funding. Recently, a number of government agencies have shown interest in expanding the number of these projects, although the resources to do so remain scarce. If ‘spin-off’ projects are to succeed, care will need to be taken to retain the human qualities of genuine warmth, mutual trust and dedicated commitment that underpin their achievements.

- *Private employment agencies* – there have been some imaginative developments to link older adults to suitable employers, including some agencies that offer job search and job-application services on line. Some also offer training to improve employability. However, more needs to be done to encourage and assist private employment agencies to achieve the Department for Education and Skills (DfES) matrix standard for information, advice and guidance services.
- *Peer support* – which happens naturally where older adults come together in groups for guidance and learning. A number of projects have trained older adults in peer mentoring skills and identified suitable adults to act as ‘learning champions’ or ‘computer buddies’. Perhaps the most significant example of the use of peer mentors is the TUC Learning Services’ development of Union Learning Representatives (ULRs), the majority of whom are 35+ and who support and encourage large numbers of older employees, many with few if any qualifications, to learn. ULRs are not intended to be guidance experts, and need the continuing support of company management and efficient local networks of learning and guidance providers to maximise their effectiveness.
- *Career guidance support and development in the workplace* – which remains underdeveloped for all age groups. The report outlines initiatives to encourage many more employers to appreciate the economic and workforce advantages of extending career guidance support in the workplace. This should be linked to learning strategies that are open to all employees, regardless of age or occupational status – some of these are government initiatives, including guidance projects initiated through the Learning and Skills Council (LSC) Quality Development Fund and DfES Guidance Pilots and to support the Employer Training Pilots – all of which have helped considerable numbers of older employees. Many older employees have high levels of skill but have never had their skills accredited. Older adults who are motivated and update their skills can make significant contributions to company productivity, and are more likely to be retained in the workforce. Increasing numbers of employers report that an age-diverse workforce is good for staff morale, customer relations, efficiency and profitability.

The report points out that well-structured career development strategies provide invaluable opportunities for employers to listen to the needs of their staff and the issues that concern them, and, where appropriate, to take action. Some of the key issues of concern to older employees are also of national importance and require detailed attention at national level. These include the following:

- The relationship between ageing, work and health – including adjustments to the workplace and conditions at work that may enable older adults to continue to maximise their contributions for longer periods.
- The types of occupations that may be particularly suitable for older adults. This is a key issue if and as older adults are encouraged and expected to work for longer, and need to do so for financial reasons.
- A desire to ‘get off the treadmill’, often because of the particular characteristics of the modern workplace, including uncaring management attitudes and values, the target culture and frequent reorganisation. However, disenchantment with the workplace may not mean that older adults want to ‘retire’, although they may want to change occupations, follow personal interests and realise previously unrecognised potential.
- Preparing for ‘retirement’, possibly on a gradual basis and with the opportunity to develop new activities and interests, i.e. downshifting.

These are all areas where substantial research and development is required in order to prepare the economy, labour market, communities and individuals to meet the demands necessitated by demographic change.

## **Section 4 Lifelong learning and older adults**

Recent research is used to identify the learning requirements of older adults, based on feedback from people aged 45+ and from front-line workers. The tendency for many older adults to regard themselves as ‘too old to learn’, often reinforced by negative attitudes towards third age learning in some communities, and by the cost of learning, are main barriers for many aged 45+. However, some of these barriers may be successfully overcome: where older people are consulted, are partners in the learning process and courses are tailored to meet their identified learning requirements; and where adults are positively welcomed by learning providers who are sensitive to third age learning needs, and ensure that the 45+ receive individual and peer support.

To date, government policy has been ambivalent in its approach to adult and third age learning. Its apparent support can be tempered by policy decisions that, for example, could increase the costs of learning above level 2 for many older people who are already unable to pay, and impose upper age restrictions on key areas of learning and training (e.g. adult learning grants for level 3/technician-level

qualifications in key skill shortage areas). The effect can be to block individual opportunities for progression, as well as proving detrimental for the national economy. Many employers are reluctant to train older workers or to meet the costs of training, except where these are supported by external government funding.

There is an urgent need for an overall national third age learning and guidance strategy, which prepares the UK for demographic change, is integral to the national skills strategy and enables adults aged 45+ to maximise their skills and potential, and to progress. The report selects a number of education and training projects and initiatives in the UK to show that, although there are major gaps, much of the framework for a third age learning strategy is already in place. The examples chosen include skills training schemes and also community-based projects that enable older adults to contribute to their local communities through volunteering and responsible citizenship. The report points out that a framework does not constitute a strategy and that a strategy requires government intervention. If the 50+ are to be enabled to play their full part in contributing to the national economy, then there has to be a sea-change in attitudes towards third age learning – from employers, individuals and communities, and from Government itself.

### **Section 5 Co-ordination: the need for ‘joined up’ thinking and implementation**

The report outlines the work of a number of non-government and voluntary agencies that are active in promoting the work and learning requirements of older adults. The network nature of these organisations means that they are often particularly effective in listening closely to the grassroots needs of older adults and conveying these to government and other influential bodies. Some university research departments specialise in research into aspects of growing older including work and learning, and it is important that this research should help to inform national policy towards older people. Some government departments and agencies are making important contributions to encourage greater national focus on third age guidance, learning and employment issues, although the initiatives tend to be piecemeal rather than part of a co-ordinated national strategy. The report contrasts four key government reports to illustrate differing government attitudes in respect of the priority that should be afforded to developing and utilising the economic potential of older people, and their role in helping to realise government skills and lifelong learning strategies. For example, the Scottish lifelong learning and skills strategy prioritises the economic and demographic importance of ensuring that maximum use is made of the skills, experience and potential of the older workforce, whereas the English skills strategy document refers to older adults only in their reactive role as ‘pensioners’.

The report emphasises that the pressing national need is for a visionary third age strategy that seeks to make much more extensive use of people's skills and experience irrespective of age. A co-ordinated national strategy that embraces work and learning, as well as pensions and care, would need to be shared and implemented by all relevant government departments to avoid inconsistencies in policy between departments and ensure maximum impact. The logic of current demographic change is that the introduction of such a strategy will soon become unavoidable.

Guidance should be seen as central to a third age strategy and to current movements to personalise public services. Guidance workers engage with the personal circumstances of individuals, help people to relate options and choices to their own situations, and assist and support them with the myriad individual decisions this may involve. The older people are, the more 'personal baggage' they have acquired and the more complex the decisions may be. High-quality guidance services provide Government with invaluable opportunities to listen closely to the needs of individuals, and therefore to shape initiatives and policies with greater assurance that they can succeed. The 'Stage Post' concept of third age guidance delivery proposed by NIACE, which relates guidance to the stage of life that older people have reached rather than chronological age, is seen as highly constructive. The report relates Stage Posts to NIACE's pilot development of a 'Curriculum for Later Life', which is being designed in consultation with older adults, and aims to help them understand:

- 1 the impact of demographic change
- 2 the need this is creating for older adults to be involved proactively in volunteering, mentoring, responsible citizenship and the labour market.

The NIACE proposals are described in some detail because they raise profound questions about the future role of older adults within the economy and society, and pinpoint many of the main issues that demographic changes are increasingly raising for Government and local communities.

The report concludes that the main challenge for policy makers is to identify and introduce strategies and interventions that are genuinely successful in preventing the continued loss to the economy and community of third age abilities, experience and potential.

### 3 Key recommendations

Note: the key recommendations also signify main areas where action is required to engage larger numbers of older adults in work and lifelong learning, and to provide the guidance support many require to help them overcome the individual and structural barriers preventing them from working and continuing to develop and utilise their skills and potential. The recommendations are addressed to Government, policy makers, stakeholder agencies, employers, unions, and guidance and learning providers, as appropriate. In some cases, government action will be necessary to implement the recommendations. In other cases (indeed the majority), implementation is likely to prove a shared responsibility, and organisations – including Government – will need to be prepared to listen and learn from each other’s experience and work together. The recommendations have therefore deliberately not been classified in categories indicating the key agency/ies responsible for implementation. The overriding condition is that all the partners should share a similar commitment to the overall aim of the continued involvement of older adults in work, learning and active citizenship, and an appreciation of the economic, social and individual benefits of doing so.

The recommendations are not necessarily arranged in hierarchical order but primarily to show how the elements of policy and practice interlink. Paragraph references are to full report.

#### **‘Joined-up’ government strategies**

- 1 Communicate the economic consequences of third age under-employment to Government and the economic importance of ensuring that adults aged 50+ have access to opportunities that enable them to contribute effectively to the national economy. Spending to enable many more adults to work, learn and contribute to the economy and community should be seen increasingly as a necessary investment in the UK’s future prosperity and competitiveness, which will pay dividends far outweighing the initial expense. (Paragraphs 1.1–1.23; 3.40–3.41; 3.92–3.93; 4.87–4.89; 5.1–5.3; 5.5–5.7; 5.8–5.14; 5.26–5.28.)
- 2 Promote the economic, social and individual benefits of introducing an overarching and ‘joined up’ national government third age strategy that positively encourages adults aged 50+ to continue to develop and utilise their skills, experience and potential, and provides them with the facilities to do so. The strategy should be agreed and implemented by all relevant government departments, and be integral to the national skills strategy. (Paragraphs 1.6–1.13; 2.22–2.24; 3.40–3.41; 4.3–4.9; 4.68–4.70; 4.87–4.89; 5.1–5.3; 5.4–5.7; 5.8–5.14; 5.26–5.28.)

- 3 Lifelong learning and career guidance should be central to the third age strategy, so that those aged 50+ have: (i) sufficient opportunities to retrain, upskill and progress; and (ii) skilled help in enabling them to relate the opportunities to their personal circumstances and individual aims and objectives. (Paragraphs 2.8–2.13; 2.22–2.28; 4.2; 4.87–4.89; 3.1; 3.18–3.19; 5.1–5.3; 5.6–5.8; 5.9–5.43.)
- 4 Explore effective ways of enabling Government and senior policy makers to understand: (i) the various interlocking activities of career guidance; and (ii) the key role that high-quality career guidance can play in helping individuals to relate national and local options and opportunities to their personal requirements, and to make wise and well-informed decisions. (Paragraphs 2.1–2.19; 2.22–2.28; 3.6–3.12; 3.23; 3.34–3.57; 3.58–3.62; 3.68–5.73; 3.92–3.93; 4.2; 5.1–5.3; 5.6–5.7; 5.16–5.43.)
- 5 Develop efficient and ‘joined-up’ communication procedures linking front-line learning and guidance providers, the IAG Boards, Local Learning and Skills Councils (LLSCs), Regional Skills Partnerships and the National Skills Alliance so that ‘grassroots’ feedback – including issues, barriers and gaps affecting older adults – can help to inform national policy decisions. (Paragraphs 2.16–2.17; 4.68–4.70; 3.48 (viii); 3.50 (vi); 3.56; 6.1–6.3; 6.16–6.43.)

## **Reaching out to and involving older age groups**

- 6 Encourage Government, government departments and agencies to place the same emphasis on the proactive involvement of older people in the community as they do on older people as the reactive recipients of pensions and caring services. The Pensions Service could play a key role here in providing adults aged 60/65+ with tailored local information, including information on learning, citizenship, working longer and where to obtain information on paid work. (Paragraphs 3.13–3.17; 5.11–5.14; 5.29–5.41.)
- 7 Re-examine the current validity of Key Conclusion 10 of the Cabinet Office Strategy Unit (Performance and Innovation Unit) report, *Winning the Generation Game* (2000) that proposed the introduction of pilots ‘to explore new ways of recognising and rewarding volunteering opportunities’. (Paragraphs 1.16–1.17; 3.101–3.103; 5.36–5.38.)
- 8 Develop outreach guidance and training programmes that seek to engage greater numbers of the ‘hidden unemployed’ – both those on incapacity benefits and those many ‘retired’ who want to work but have given up after constant rejection. (Paragraphs 1.3–1.4; 3.3; 4.10–4.17; 4.23–4.24; 4.71–4.86; 5.7; 5.17–5.18.)

- 9 Consider launching a targeted marketing campaign through learndirect that helps older age groups to understand that they are never too old to learn, and that learning, and the services of learndirect and guidance providers (IAG Partnerships, Careers Scotland, Careers Wales, the Careers Service and Educational Guidance Service in Northern Ireland) are also meant for them. (Paragraphs 4.2; 3.50; 3.51 (i); 3.63–3.67; 5.8; 5.30–5.43.)
- 10 Ensure that older adults are always consulted about their work, learning and guidance requirements, and that policies and provision (including education and training courses) are not determined on the basis of top-down assumptions. Involve older adults in aspects of delivery, for example as ‘learning champions’ and peer mentors, and train them in the necessary skills. (Paragraphs 2.8–2.13; 3.30–3.31; 3.51 (v); 3.82–3.89; 4.2; 4.10–4.17; 4.78; 4.80; 4.82–4.83; 5.1–5.3; 5.17–5.43.)
- 11 Where guidance and learning provision is open to all adult age groups, always make certain that older adults know they are welcome. This also applies to web sites and other sources of information, which should assure those aged 50+ that the sites are designed for all age groups with no upper age limit based on stereotypical assumptions that people ‘retire’ at state pension age. Many older adults do not know how to access guidance services, and web sites and other ‘gateway’ information should contain precise information stating clearly how they do so and the help that each service offers. (Paragraphs 3.23; 3.26; 3.30–3.33; 3.48 (iii); 3.50; 3.56; 5.17–5.43.)

## **Employment and the workplace**

- 12 Initiate practical programmes of research that: (i) identify those aspects of the workplace and working practices that affect job satisfaction and make many adults aged 50+ want to retire early; (ii) help employers to understand how to adjust working conditions and practices in ways that enable older employees to remain working for longer, but also to continue to maximise their skills and experience while doing so; and (iii) identify occupational areas that may prove particularly suitable for many older workers. (Paragraphs 1.14–1.15; 3.94–3.103; 5.8; 5.10; 5.12.)
- 13 Prioritise those developments aimed at enabling and encouraging employers to (i) increase learning provision; and (ii) introduce and implement career guidance support strategies to facilitate individual development. These should be open to all employees, regardless of age and occupational status. Help employers to understand the advantages of workplace career guidance in enabling them to

obtain feedback on the needs of employees and how this can help them improve working conditions and staff motivation, and therefore their own productivity. (Paragraphs 1.1; 2.15; 3.23; 3.27; 3.30; 3.46–3.47; 3.51 (iv); 3.90–3.103; 3.104; 4.3; 4.27–4.36; 4.37–4.47; 4.48–4.50; 4.51–4.52; 4.53–4.55; 5.25–5.29; 5.38–5.43.)

- 14 Reinforce the development and quality of career development support strategies in the workplace, available to all employees regardless of age and occupational status, through the Investors in People Quality Mark, and link this to the DfES matrix standards for information, advice and guidance. (Paragraph 3.104.)
- 15 Help and encourage more firms to introduce ‘work–life balance’ and downshifting programmes and opportunities for employees with caring and other responsibilities who want to work part time or job share, or who would like to move gradually into retirement through volunteering. Provide older employees with the support necessary to make decisions on, often difficult, life transitions. (Paragraphs 3.90–3.104; 4.18–4.22; 5.29–5.38.)
- 16 Introduce the promised amendments to current Inland Revenue rules as soon as possible, so that older full-time employees can work part time with the same employer while drawing down part of their pension, and encourage initiatives such as those practised in the United States of America where ‘retired’ employees can join company job banks and fill in on a temporary basis during peak periods or staff absences. (3.101–3.103.)

## **The skills agenda and lifelong learning**

- 17 Strengthen the external support networks available to Union Learning Representatives, for example through the Information, Advice and Guidance Partnerships and Careers Services. (Paragraphs 3.85–3.89.)
- 18 Continue to extend and publicise government initiatives, such as the Employer Development Pilots, aimed at raising the educational level of all adults to a minimum of level 2. Targeted English for Speakers of Other Languages (ESOL) provision is needed for many older women and men from ethnic communities, who are disproportionately affected by unemployment. (Paragraphs 1.18; 3.5 (ii), (iii) & (v); 3.26; 3.30; 3.48 (ii); 3.50 (iii); 4.27–4.36; 4.37–4.47.)
- 19 Re-examine the current proposal to increase charges for the vast majority of adults for learning above level 2, unless employers are prepared to pay the full fees. Recognise that many older adults who may have attained level 2

qualifications remain disadvantaged because of their age, and conscious and unconscious discriminatory practice in employment and community. Prioritise individual progression in the interest of the economy, communities and individuals, and international competitiveness in a global economy. (Paragraphs 1.1–1.2; 3.48 (ii); 3.51 (ii); 3.67; 4.2 (iv); 4.30; 4.34–4.36; 4.46–4.47; 5.7; 5.13; 5.22–5.29; 5.42–5.43.)

20 Encourage and facilitate much more extensive utilisation of the skills, experience and potential of mature workers to help in meeting the national shortage of workers with technical, supervisory, customer-relations and equivalent level 3 skills. Expedite the promised Mature Apprenticeship system so that Government can be seen to be providing a lead to industry to develop higher craft and technician level training programmes for mature workers. (Paragraphs 1.1–1.2; 3.5 (xi); 4.5; 4.46–4.47; 4.48–4.50; 4.51–4.52; 5.8; 5.10; 5.22–5.28; 5.42–5.43.)

21 Initiate a research programme, in collaboration with the Sector Skills Development Agency and the Sector Skills Councils, that identifies how third age skills, experience and potential can help industry to meet its skill requirements and fill skill gaps. (Paragraphs 4.65–4.67.)

22 Abolish the age restrictions of age 30 for Adult Learning Grants for level 3 qualifications and age 54 for entitlement to student loans in order to enable more older adults, and especially those with limited finances, to realise their ambitions and achieve their potential. (Paragraphs 4.5; 5.10; 5.15; 5.26.)

23 Ensure that lifelong learning is genuinely lifelong and that the phrase, and therefore the practice, do not descend into rhetoric. Understand that lifelong learning, the fast-changing labour market, which will continue to change throughout people's lives, and the developing needs of communities require access to lifelong guidance if the vast majority of people are to be able to cope with the pace of change and make well-informed and wise decisions about work, learning, citizenship, finance and the practicalities of growing older. (Paragraphs 1.1–1.23; 3.39 (ix); 3.40–3.41; 4.1–4.2; 5.8; 5.17–5.43.)

24 Map the supply and cost of learning opportunities, including occupational skills training, in each local area that are available for older adults, and identify the gaps. Review the effect of the six-month waiting period for Job Centre Plus training programmes on the morale and employability of the 50+, and the scale of dropout from the labour market caused by the eligibility condition. (Paragraphs 4.60–4.64; 4.87–4.89; 5.31; 5.38.)

- 25 Set targets at either national or regional level for the involvement of older adults in skills training and learning, but ensure that the data are collected on a standardised basis agreed at national level so that meaningful comparisons can be made on third age involvement and progression. (Paragraphs 4.8; 4.28; 5.8; 5.13.)
- 26 Ensure that the National Employment Panel's recommendations set out in the *Welfare to Workforce Development* report (2004), including those proposing much closer collaboration between the LLSCs and Jobcentre Plus in planning local learning provision and in developing closer networks with other organisations including IAG Partnerships: (i) increase the number of skills training and other learning opportunities available in each area for older adults; (ii) are used flexibly by front-line staff to help older redundant adults who want to improve their prospects through education and training well before they have reached the six-month eligibility period; and (iii) influence the supply of training available for older workers and employers' attitudes towards training the 50+. (Paragraphs 3.4–3.5; 3.12.)
- 27 The Senior Studies Institute (SSI) at the University of Strathclyde has succeeded in involving thousands of adults aged 50+ in learning, and has helped to stimulate a third age learning culture and transform the lives of older people and (increasingly) their families and communities, in the City of Glasgow and in other parts of Scotland as well. Large numbers of 50+ have re-entered work as a result of their learning and many others are involved in volunteering. Important aspects of the SSI's work are directed at industry. Examine the University of Strathclyde model closely and consider how far the model may be transferable to other further and higher education institutions throughout the UK. (Paragraphs 4.10–4.25.)

## **Guidance services**

### ***Policy***

- 28 Identify people aged 50+ as a priority group for career guidance wherever there is the local flexibility to do so. Most are disadvantaged on age grounds alone, irrespective of qualification level. (Paragraphs 3.26; 3.30–3.31; 3.51 (ii); 5.6–5.7; 5.17–5.18.)
- 29 Encourage and support the further development of targeted third age guidance and learning initiatives, and 'all-age' community-based initiatives that help large numbers of older adults, and take steps to preserve the personal service and

staff commitment that have made many of these projects so successful. (Paragraphs 2.16–2.17; 3.74–3.77; 4.1–4.2; 4.10–4.17; 4.71–4.86; 4.88.)

- 30 Consider the possibilities offered by: (i) NIACE’s Stage Posts concept to make guidance provision (including learning, career and skills analysis, financial, health, volunteering, caring and work–life balance) more widely available to older adults through a linked network of providers; and (ii) NIACE’s related ‘Curriculum for Later Life’ proposal in terms of helping older adults gain a better understanding of current demographic and social changes, the reasons why older people are gradually being encouraged to contribute more to the economy and communities, and the opportunities this can create. (Paragraphs 5.30–5.43.)
- 31 Use the opportunities offered by the LSC/learnDirect National Resource Centre and the DfES-supported National Guidance Research Forum (as appropriate) to: make information and guidance resources for older age groups more widely available; identify gaps in provision; develop new resources; and initiate research on third age guidance, learning and work issues and practices, including ‘making the case’ for guidance and learning for older adults to senior policy makers. (Paragraphs 2.11–2.13; 3.23; 3.26–3.27; 3.48 (vii); 3.50 (v); 3.53–3.57; 3.68–3.69; 3.90–3.103; 5.1–5.3; 5.8.)
- 32 Take steps to safeguard those guidance initiatives that a number of IAG Partnerships have introduced to assist older adults, but whose future may be prejudiced by the current reorganisation of career guidance in England. Work with the LSC and IAG Partnerships to encourage the establishment of guidance and learning initiatives (including initiatives that combine both these activities) to target those aged 50+. (Paragraph 3.51 (iv); 5.1 (viii).)
- 33 Keep under constant review the negative effects that divided and fragmentary career guidance provision can have on the quality of service for all age groups, including those aged 45/50+, and be prepared to listen and take action. (This recommendation applies particularly to England.) (Paragraphs 3.34–3.57.)
- 34 Create mechanisms that enable policy makers and providers to exchange, compare and learn from third age guidance and learning practice on a UK-wide, European and international basis. If it proves possible to establish a UK-wide National Guidance Policy Forum and International Centre for Career Development and Public Policy, these bodies would facilitate the process. (Paragraphs 2.22–2.28; 3.22–3.57; 3.68–3.73; 5.39.)

- 35 Map the extent of private guidance provision, including geographical spread, and assess the ability and willingness of adults aged 45+ to pay for commercial guidance services. (Paragraph 3.51 (iii); 3.78–3.81.)
- 36 Remember that the right place to develop ‘lifelong’ career management skills, including an understanding of the importance of lifelong learning, is in school and college. Structure the career education and guidance system so that young people (i.e. the future generations of older adults) acquire these skills in their youth and are then able to use these to learn, progress and manage their careers and key transition points, throughout life. (Paragraphs 2.12–2.15; 3.34–3.41.)

### ***Practice***

- 37 Train front-line staff to be genuinely client-centred, sensitive to the needs of older adults, and able to listen carefully to their individual hopes and requirements. Help staff to understand that many older adults are put off by front-line workers who prioritise their own agendas, including target achievement. Make sure that staff have time to listen. Help them to understand that many older adults understandably want to explore a change of jobs and the opportunity to fulfil previously unfulfilled ambitions and interests, after a lifetime in the same occupational area. (Paragraphs 1.14–1.15; 2.10–2.15; 3.2–3.3; 3.6–3.12; 3.28; 3.94–3.100; 4.2; 5.18–5.22.)
- 38 Ensure that local labour market information is relevant and easily accessible to older age groups. (Paragraphs 3.23; 3.39 (i) and (ii); 5.30.)
- 39 Ensure that guidance workers work closely with industry and act as informed advocates to influence the demand for older adults as well as the supply of suitable applicants. (Paragraphs 2.12; 2.18–2.19; 3.3–3.5; 3.39 (vii); 3.92–3.93.)
- 40 Organise locally based ‘career and learning conventions’ and equivalent events for older adults so that they can meet and discuss opportunities face-to-face with employers, learning providers, voluntary agencies and other relevant bodies. Provide space at these events for consultations and opportunities for people to express their views, wherever possible with local and national policy makers. (Paragraphs 2.18–2.19; 3.3 (vii).)
- 41 Provide older adults with sound financial advice and guidance on which they can base their future occupational and life decisions, including decisions about such options as part-time working, self-employment and ‘retirement’, and the financial benefits that may result from working (e.g. increased savings and pensions,

avoiding the benefits trap). Ensure that high-quality training and mentoring are available to support those who have the skills, knowledge, experience and necessary capital to become self-employed and to do so successfully.

(Paragraphs 2.11; 3.5 (ix); 3.13; 3.39 (iii); 3.98; 3.103; 4.2 (iv); 4.50; 4.56–4.59; 5.1 (vi); 5.9 (vi); 5.11; 5.14; 5.30; 5.33–5.34.)

42 Make full use of: (i) work experience, work trials and similar arrangements where older adults can test their reactions to new occupational areas and demonstrate their skills and potential to prospective employers; and (ii) bite-size learning and other sampling programmes where older adults can experience learning opportunities on an exploratory basis and without commitment. (Paragraphs 3.3; 5.30.)

43 Utilise the facilities offered by e-learning, e-guidance, telephone helplines and other methods of delivering guidance services at a distance, to extend guidance and learning to much greater numbers of older adults. However, remember that many older adults also want and need direct personal relationships with their tutors, guidance workers and learning/guidance peer groups, and do not see guidance and learning at a distance as a substitute. (Paragraphs 3.3 (ix) and (x); 3.22–3.33; 3.39 (vii); 3.51 (i); 3.58–3.62; 3.63–3.67; 4.18–4.22; 4.26; 4.40–4.44; 4.53–4.55.)

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