



Am I Still Needed ?

Guidance and Learning
for Older Adults

Geoff Ford

Geoff Ford is a Senior Consultant for the Third Age Employment Network, a Fellow of the National Institute for Careers Education and Counselling at Cambridge, and a Visiting Associate of the Centre for Guidance Studies (CeGS) at the University of Derby.

This report makes a ground-breaking contribution to work with older adults. The report will be a source of inspiration for policy makers, researchers, trainers and practitioners and will provide a major reference now and in the future.

igen, NAEGA and TAEN are pleased to be able to jointly sponsor *Am I Still Needed? guidance and learning for older adults* which we see as a significant contribution to the development of guidance practice.

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Preface

The recent OECD Career Guidance Policy Review¹ indicated that a life-stage where current career guidance provision is particularly inadequate is the third age. Many countries are expressing growing policy concerns about their ageing populations and difficulties in funding adequate pension provision, and the consequent need to encourage people to stay longer in the labour force. There is also growing policy interest in encouraging those who have left the labour market to continue their involvement in learning and in voluntary work in the community, so reducing health bills and harnessing their social contribution. But no country has yet systematically addressed the potential role of career guidance services in these various respects, and more generally in helping individuals to manage more gradual and more flexible approaches to ‘retirement’.

Geoff Ford’s ground-breaking work in this area is therefore of international significance. An earlier report of his² was cited in the OECD review. A subsequent report in which he was closely involved provided the first large-scale UK study of third-age guidance requirements and provision.³ This new report places the need for third-age guidance in a strong policy context, with compelling evidence and clear recommendations for action. It should be of considerable interest to policy-makers not only in the UK but beyond. I hope it will influence their decisions too.

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¹ Organisation for Economic Co-operation and Development (2004). *Career Guidance and Public Policy: Bridging the Gap*. Paris: OECD.

² Ford, G. (1997). *Career Guidance for the Third Age: a Mapping Exercise*. NICEC Project Report. Cambridge: Careers Research and Advisory Centre.

³ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DFES

Acknowledgements

The ‘Am I still Needed?’ report results directly from the Joseph Rowntree Foundation (JRF) research programme on how people are making transitions in work and towards retirement after age 50. The JRF programme is proving to be ground-breaking, and is shedding new light on people’s experiences in the workforce, the manner in which they leave it and what is happening to people aged 50+ outside paid work. Donald Hirsch, Special Adviser to JRF, asked me to write a paper on guidance and learning for older adults throughout the UK for inclusion in a JRF overview publication, and in order to do this I first had to undertake a sizeable research programme and then structure the data into a generic report.

I am extremely grateful to Donald Hirsch for giving me this opportunity, and for being the first to advocate that the ‘Am I Still Needed?’ Report should be published in its entirety because he considered it to be of potential value to guidance practice in the UK and internationally - and especially so in relation to older adults where recent reports on guidance practice in 37 countries commissioned by the OECD, World Bank and European Community have identified severe weaknesses. Others have since urged publication including: Professor Jonathan Brown of the Open University and Life President of the National Association of Educational Guidance for Adults (NAEGA); Patrick Grattan, Chief Executive of the Third Age Employment Network (TAEN); Dr Wendy Hirsh, Fellow of the National Institute of Careers Education and Counselling (NICEC) at Cambridge; Deirdre Hughes, Director of the Centre for Guidance Studies at the University of Derby; Professor Jim Sampson, Co-Director for the Center for the Study of Technology in Counselling and Career Development at Florida State University; Jim Soulsby, Development Officer of the Older and Bolder programme, National Institute for Adult and Continuing Education (NIACE); and Professor Tony Watts of the University of Derby and Canterbury Christ Church University College, and Senior Fellow of NICEC. I am grateful to these and other colleagues for their faith and encouragement, and to Deirdre Hughes for her indefatigable enthusiasm and determination in seeing the ‘Am I Still Needed?’ report through to publication.

A number of colleagues read and commented on the report in its draft form. These are: Jonathan Brown; Patrick Grattan; Lesley Hart, Director of Lifelong Learning at the University of Strathclyde; Deirdre Hughes; Chris Pitura, Senior Consultant, TAEN; Jim Soulsby; Barbara Watkins, Senior Consultant, TAEN; and Tony Watts. Tony also acted as critical reader and, with typical integrity and commitment, corrected the whole of the first draft during a return flight to Australia. I am most grateful to all these colleagues for their suggestions, most of which have been incorporated in the final version.

I would like to pay a special tribute to Keith Frost, Business Manager of TAEN, who brought a number of recent reports to my attention and assiduously arranged for these to be printed out to save valuable time. Jim Soulsby and Gillian Aird of Older and Bolder, NIACE, have provided invaluable support, including researching data on my behalf and directing me to a number of publications and sources of information. Ros Carr and Alice Mahon of the University of Strathclyde Senior Studies Institute, and Christine Harper and Sarah Collison of Guidance Enterprises Group Ltd, have been similarly supportive and

meticulous in responding to my many enquiries. The onerous task of checking the proofs has been lightened by the understanding, efficiency and patience of Hayley Reynolds, Research Assistant at CeGS.

I am delighted that Steve Higginbotham, the Chief Executive of igen Ltd, has been able to co-sponsor publication. igen is responsible for career guidance in Leeds and (for adults) in Humberside and Teesside also. igen’s sponsorship gives me particular pleasure because for many years (in the days when there were principal careers officers) I was responsible for running the careers service in Leeds. I am extremely proud of Steve’s very considerable achievements in developing and expanding career guidance provision for young people and adults in a much more difficult climate than I ever experienced. I have worked with Steve and his staff on a number of occasions and know how committed they are to the welfare of the many young people and adults whom they serve, and the extent to which they meet the high professional standards that Steve rightly demands both of himself and those for whom he is responsible. May the quality of their work on behalf of the public in West Yorkshire, Humberside and Teesside continue to gain the recognition that it so rightly deserves.

NAEGA’s co-sponsorship gives me equal pleasure. As many of us have experienced over the years, Jonathan Brown is always there, a tower of strength with the warmest of welcomes, and his irrepressible humour and wise counsel have now spurred, helped and supported literally generations of guidance workers. It was my privilege to serve with Jonathan as a NAEGA Committee member in the 1980s and to work with Jonathan, Dorothy Eagleson, Viv Ravis, Professor Stephen McNair (of NIACE and now responsible for the Centre for Research into the Older Workforce at the University of Surrey) and others on the seminal and highly influential report *The Challenge of Change: Developing Educational Guidance for Adults* which was the first report to define guidance in terms of its component activities. A close colleague recently described NAEGA as her “spiritual home”, and I – in company with many others – know exactly what she means.

Finally I would like to thank Ruth Hawthorn (NICEC) for her gentle and uplifting encouragement throughout the whole of this project, and my wife Jean who has patiently endured the many mental as well as physical absences which the partners of research workers will know so well. Without their faith and encouragement I could not have succeeded in completing a task which, in the event, proved much more challenging than I had originally anticipated.

Geoff Ford

Executive Summary

TEN KEY POINTS

- 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 over-arching 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 counter-balanced by 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 are required that reach out to the 'hidden unemployed', including 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 under-utilised potential; changes in personal values; and consciousness that time is running out if they to achieve their personal ambitions and objectives. Simultaneously, many older adults want to retire from their current place of work (but not 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. Frontline feedback is needed to inform policy-making and ensure its effectiveness and relevance.
- 9 Older people welcome high-quality guidance. Provision 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 NIACE) should also be given serious consideration.
- 10 Mechanisms are required in the UK 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. On current evidence England has much to learn from the developments taking place on Scotland, Wales and Northern Ireland.

REPORT SUMMARY

Introduction

This 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 over-arching 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 re-orientate 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 under-estimated or overlooked by policy-makers are: the role that frontline 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 (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*', 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:

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 than the vast majority of helping agencies, and especially so for those with limited or no qualifications. 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 re-skill for jobs that interest them. The Report considers the recommendations of the National Employment Panel (*Welfare to Workforce Development*, 2004) in terms of services for the 50+. The recommendations of the 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 (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 website; 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 fora are therefore in the interests of older age groups.

E-guidance – which includes use of: email; chat; text messaging; on-line discussion; e-learning; websites; video conferencing; on-line diagnostic interest and skills inventories; psychometric tests; databases of work, learning and volunteering opportunities; on-line LMI; and guides on such areas as CV

preparation and jobsearch. 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 help-lines – experience shows that these can provide valuable assistance to older adults wanting information and advice on learning and work, provided they are either specifically targeted 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 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, the majority of whom are 35+ and who support and encourage large numbers of older employees to learn, many with few if any qualifications. 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 under-developed 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, 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 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 moral, 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 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 are 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 coordinated 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 stage, 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 (i) the impact of demographic change and (ii) 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 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.

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 provider, 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 over-riding 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.

‘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, that 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 over-arching 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 the 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 frontline learning and guidance providers, the IAG Boards, 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 websites and other sources of information, which should assure the 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 websites 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. (Paragraphs 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 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, does 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 drop-out 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 is 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, including those proposing much closer collaboration between the LLSCs and Jobcentre Plus in planning local learning provision and to develop 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 frontline 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 the 50+. (Paragraphs 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 frontline 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 frontline 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) & (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 that 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 help-lines 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) & (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.)

Am I Still Needed ?

Guidance and Learning for Older Adults

Introduction

- 1 Current demographic changes are leading the UK and much of the developed world into uncharted territory. The number of older people in communities is increasing and the number of young people decreasing. Except possibly in time of war the situation is unprecedented. In terms of the labour market, an already critical situation is further accentuated by technological and global forces, necessitating an extension of the period of front-loaded education and leading to later entry into employment by increasing numbers of young people and – unless there are changes in working custom and practice – a foreshortened working life. Declining birth rates are further affected by rising housing costs that delay young people’s independence and, once young couples have saved sufficient for a deposit, by mortgage repayments that necessitate both partners working. Young women are understandably increasingly reluctant to start families early or to break careers that they enjoy and that are flourishing. These and other related trends in society combine to increase the mounting demographic crisis.
- 2 There is now a welter of statistics available to illustrate the acuteness of a problem that could fast escalate to crisis proportions unless there is effective and concerted action across a number of fronts. Some of these statistics are used in this Report, and especially so in Section 1 which examines the economic, social and individual dimensions of third age under-employment. However, constant exposure to too many statistics and ‘bad news stories’ can cause overload and impede much needed action. For example, we become so accustomed to reading that the number of people in the UK who are over 60 now exceeds the number under 16, and that by 2010 over 40% of the population will be 45+, that the facts become part of the furniture of living. As a result, we may fail to recognise the need for a paradigm change in the way that we think about older adults in relation to national and local policy decisions, the communities in which they live, and their own hopes, ambitions, uncertainties and requirements. Key policy areas central to the UK’s ability to cope constructively with demographic change include: our current education system and how it is shaped by national judgements about ‘the right stages of life to learn’; the abilities and potential of older people themselves and how far we consider that these should continue to be nurtured and developed; and our attitudes towards older people, and what these attitudes may make older individuals themselves feel about their role and status in the communities in which they live, work and inter-relate with other age groups.
- 3 Nations and communities can cope with the immense challenges posed by demographic change – but only if they are prepared to: think positively and constructively about the issues and challenges; understand that many older people have immense abilities, experience and potential; and adapt and change their attitudes, policies and provision accordingly. The need now is for proactive and concerted strategies across a range of fronts, and in the governmental context involving a number of government departments and agencies. Reactive policies are no longer sufficient. These include policies that focus on issues (however important these may be) in which older adults are seen mainly as consumers of state resources. Conversely, proactive strategies regard older people as potentially positive contributors to the Gross National Product (GNP), whether employed in paid occupations or involved in formal or informal volunteering, good neighbourliness and responsible citizenship.

- 4 Much of the current attention is concentrated on pensions and the rights or wrongs of extending working life, the latter largely by retaining older people for longer periods in those occupations and workplaces in which they may have been employed for most of their working lives. These are indeed critically important issues. However, the agenda now needs to be broadened considerably if the economy is to continue to expand – or indeed survive in the form to which we have become accustomed. Carefully considered strategies are required that actively seek to harness and develop the skills, experience and potential of older adults, to the benefit of the national economy and local communities, and to older adults themselves.
- 5 For example, a significant proportion of older workers wish to continue working with the same employer and in the same occupational area to which they have become accustomed. Their situation will be helped by the forthcoming European legislation from 2006 to illegalise age discrimination in the workplace. However, if their skills and abilities are to be fully utilised, measures to extend working life need to be supported by positive and inclusive training strategies that ensure older workers: continue to be trained; are enabled to take full advantage of the learning opportunities; and are not left moribund and frustrated simply serving out their time. Successful training strategies that involved older age groups may also mean working with older employees to ensure that they have positive attitudes towards training and do not regard themselves as too old, and therefore write themselves off. Older adults create their own stereotypes of ageing, often based on the attitudes towards older age groups prevalent in their own community and society more widely.
- 6 However, the evidence shows that many older adults want to continue to work, but not necessarily in the same jobs in which they have worked for most of their lives. Large numbers of older workers of 50+ want a change of occupation, for reasons that include the development of new interests and abilities, and the discovery of previously unrecognised potential. Keeping these workers in jobs which they may well have outgrown, and which are no longer suitable, is not the answer. It minimises the contributions they could otherwise make to national growth and competitiveness, and to their own communities, and builds up frustration. In practice, the overall effect may prove negative – for their employers and for the individuals concerned. Proactive strategies are therefore required that ensure that lifelong learning is truly lifelong, and that access is genuinely open to all. If older adults are to thrive in employment, then the policies that enable them to continue to work need to be based on individual growth and development, and not on compulsion and ‘policing’ approaches to reduce national unemployment figures and the costs of incapacity benefit.
- 7 There are profound issues here, and these are explored at relevant stages throughout the Report. They include the prevalence in large swathes of industry of working practices and conditions that can become increasingly less congenial as workers age. They also include the general lack of individual support structures, including career development support, for many workers including older employees. The greater development of career guidance support and mentoring strategies that embrace all levels of staff irrespective of age and status, is a critical issue for the vast majority of UK companies and is inseparable from the deficiencies – including the general lack of inclusiveness – that exists in many company training programmes. The overall issue is about how to guarantee high staff motivation – and high staff motivation, irrespective of age, is fundamental to company health and profitability.
- 8 The assertion that underpins the whole of this Report is that the vast majority of adults aged 50+ have a wide array of talents, abilities and experience that nations and communities require if they are to succeed in meeting the many challenges presented by

demographic change. These challenges must not be under-estimated if they are to be resolved. Ultimately they have the capacity to undermine the developed world as we know it. Given current demographic trends, there will not be sufficient younger people to meet the demands of the workplace, and consumer demand could decline substantially if increasing numbers of older people are unable to work and fall into varying levels of poverty. However, many adults aged 50+ want to work and contribute, and are deeply frustrated by the waste of their abilities and potential. This fund of talent needs to be released and developed, and this necessitates ready access by older age groups to lifelong learning opportunities, including occupational training to enable them to train, retrain and upskill as appropriate. Learning opportunities need to be readily open to all older people who require retraining and upskilling to ensure their continued employability, irrespective of previous qualification levels. The emphasis should be on maximising their economic and social contributions for the benefit of the whole community, and not on whether or not they have achieved level 2 qualifications at some previous stage of their lives.

- 9 Many older adults also need skilled help and encouragement to enable them to: overcome the personal and structural barriers blocking access to work and learning; establish or re-establish a personal sense of direction; and make the most of their abilities, experience and potential. They also want to ensure that the available opportunities meet their own ambitions, requirements and personal circumstances. Lifelong learning and the fast changing labour market require access to lifelong guidance. These are main reasons, explored further in the Report, why many older adults are so appreciative of individualised and highly-skilled guidance facilities wherever these are available – and in most areas of the UK they are in short supply. A main conclusion of the Report is that high-quality lifelong learning and guidance provision are essential elements within concerted and ‘joined-up’ strategies to cope successfully with the economic, social and individual realities of demographic change.

Terminology: (a) describing age groups and (b) ‘all age’ guidance and learning provision

- (i) The Report refers to older adults as ‘45+’, ‘45/50+’ and ‘50+’ as appropriate. The reason for this is that a number of organisations are available to, or work with, older age groups from age 45 and not 50. Experience shows that the effects of age discrimination can have adverse consequences on recruitment and career prospects from 45+, depending on occupation and employer. 45-50 is also a time when employees can profit from mid-career development programmes and other interventions to prepare them for the transitions and changes that may occur from 50+. However, government documents – for example the Cabinet Office’s influential *Winning the Generation Game* report on improving opportunities for older adults in work and community activity – tend to focus on people aged 50-65. This is, or has been until very recently, the government’s priority group of older people in terms of engagement and re-engagement in work. Some government departments, or sections within those government departments, are now more flexible about any upper age limit. For example, the DWP has commissioned and published research on why people choose to retire, indicating the growing government interest in retaining older employees in work from 65+.

- (ii) The term ‘third age’ is also used generically to refer to adults aged 45+. The 45+ represents a very large age group and should not be stereotyped according to specific age brackets, eg 45-50, 50-60, 60+, 65+. For example, some people are ready and happy to retire in their mid-50s. In contrast, over 1 million adults over 65 are currently working in paid employment, some from financial necessity but many because they enjoy doing so. Some people are still in paid employment in their 70s, 80s and occasionally 90s. Large numbers of older adults are also involved in formal and informal voluntary work. This Report is primarily concerned with helping and supporting older adults to work, learn and volunteer in accord with their own desires and needs and not in terms of any arbitrarily or bureaucratically imposed age limits.
- (iii) Key sections of the Report consider guidance and learning provision which is open to all adult age groups (ie from 13+). Much of the provision available to older age groups is not targeted only at those aged 45/50+. Often the need is to ensure that older adults know that the provision is available to them as well, and that they are welcome. In Section 3 – Career Guidance: Provision – the Report considers the advantages of all-age guidance services, including careers education and guidance in schools and colleges. England is the exception in the UK in not operating an all-age guidance service. The Report considers the advantages of all-age guidance services not only for the present generation of older adults, but also for future generations of older people who can be helped to prepare for ‘lifelong’ learning and to acquire the skills of ‘lifelong’ career management while they are in school or college.

1 The Economic, Social and Individual Dimensions of Third-Age Under-Employment

“When you’re over 50 and unemployed you have to keep saying to yourself you can’t afford it. You keep on having to balance your finances, even in the little things. Your whole quality of life is utterly changed. But you don’t want your kids to know what you’re going through. You have to keep hiding this from them. You don’t want to be helped – and it’s all so hard, so hard. It’s a national disgrace. We’ve worked most of our lives and contributed to the economy and we’ve earned our pensions and benefits – but we now have to beg for these and a decent standard of living. You’re on the scrap heap. You have to work really hard at remaining positive and keeping your motivation and self-esteem. All the time there is this unspoken innuendo – you’re too old. But we’ve all got something to offer employment and the community. We need opportunities to use our experience – where necessary to be trained and retrained – and to work. There are social costs here – costs to the economy, costs to health and costs to social services and the community. It’s an issue that the country has simply got to get hold of because there’s so much waste – at some point it could be any of us.” (Female focus group participant aged 60+, City of Sunderland, involved in the DfES-financed 2002-3 Challenging Age research project to identify the information, advice and guidance requirements of older adults⁴).

A full-time consultant in his mid-60s was recently on a holiday for the 50+. Other members of the group were surprised that he was still working. The group consisted mainly of middle- or lower-income professionals including teachers, nurses, hospital auxiliaries, physicists, chemists, and middle managers in such areas as sales and marketing – all skill shortage areas. Very few (if any) had wanted to retire when they did and would have welcomed the opportunity to remain at work, albeit with greater attention to work-life balance including opportunities for part-time working. A number spoke of colleagues who been unable to adjust to retirement and had died some two or three years later, at least partly through boredom and lack of purpose. At dinner one evening the consultant inadvisably and somewhat insensitively complained that on return to work he would have to read and respond to some 200+ emails, accumulating during his absence. A member of the group responded, “You’re fortunate to still be needed.” (Personal story, April 2004.)

⁴ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups: Annex 5: Guidance Advice and Information Network, City of Sunderland*. Sheffield: DfES.

Redundancy and unemployment

- 1.1 Arguably, older adults aged 45+ have been more severely affected than other age groups by globalisation. Economic and labour market factors include: new technologies replacing old skills; redundancy and early retirement; and sectoral unemployment affecting traditional and manufacturing industries employing a higher than average workforce⁵. Large numbers of older adults have been forced to leave the workforce prematurely, two-thirds of whom have left involuntarily⁶. Those aged 50+ in work are 50% less likely to participate in training than those aged 35-50⁷. Feedback from many older adults shows that age discrimination in employment remains a reality^{8,9,10}. This may lessen from 2006 when the EU Directive on Equal Treatment – which includes age – becomes law, but to ensure the law is effective will require careful policing.
- 1.2 In the UK almost a third of men and women aged 50+, and two-thirds of men aged 60-64, are not in work – a figure in excess of 2.5 million¹¹. Although employment rates for the 50+ have improved marginally, generally in line with the rise in population in this age group and improvements in the overall employment rate, in 2002 men aged 50-65 were 18% less likely to be in work than men aged 25-49. For women there was a less pronounced gap of 9%¹².

The ‘hidden unemployed’

- 1.3 Large numbers of unemployed older adults give up their search for work and join the ‘hidden unemployed’, of whom 1.6 million are in receipt of benefits¹³. Over one million of these are on Incapacity Benefit, but the majority were not on IB when they were made redundant¹⁴. Many of the ‘hidden unemployed’, including those on IB, say they would like to work if opportunities were available^{15,16,17}. Over the four-year period 2000-2004, the percentage of people made redundant aged 50+ who have obtained new jobs within three months has averaged 31% compared with 50% of those aged 25-49¹⁸. Many 50+ look for work when they become unemployed but give up during the first year because of the barriers they encounter^{19,20}. Although they may describe themselves as ‘retired’, the underlying desire to work often remains high. However, prolonged unemployment erodes employability²¹. Eight out of ten over-50s made redundant may never work again.²² Many older people tend to write themselves off because of their experiences of rejection, and regard themselves as too old to work or learn. This tendency may be reinforced by local cultural factors, especially in relation to older adults resistant to returning to ‘school’.
- 1.4 Attitudes towards third-age working and learning have to change, and career guidance services can play an important role in this process. By 2021 the 50+ working-age

⁵ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DfES. (This study is as yet the only large-scale study of third-age guidance requirements and provision conducted in the UK, and was led by the Third Age Employment Network (TAEN) in liaison with the National Institute for Careers Education and Guidance (NICEC) and the Centre for Guidance Studies (CoGS) at the University of Derby. The research involved interviewing and analysing feedback from adults aged 45-70+, frontline workers and managers of guidance and learning provider agencies. It was managed and the report largely written by the author of this paper, and is a main source of information on the guidance and learning requirements of older adults. The findings are drawn on extensively throughout this paper. The dissemination of the findings was financed by the LSC.)

⁶ Beatty, C., Fothergill, S., Gore, A., & Herrington, A. (1997). *The Real Level of Unemployment*. Sheffield: Sheffield Hallam University.

⁷ Third Age Employment Network (2003). *Key Facts on Age Diversity and Employment*. London: TAEN.

⁸ Age Positive (2002). *Being Positive about Age Diversity at Work: a Practical Guide for Business*. Sheffield: Department for Work and Pensions.

⁹ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DfES.

¹⁰ Department for Work and Pensions (2002). *Factors Affecting the Labour Market Participation of Older Workers*. Sheffield: Age Positive, DWP.

¹¹ Grattan, P. (2003). *Work after 60 – Choice or Necessity, Burden or Benefit?* London: Third Age Employment Network.

¹² Hirsch, D. (2004). *Crossroads after 50: Improving Choices in Work and Retirement*. York: Joseph Rowntree Foundation.

¹³ Grattan, P. (2003). *Work after 60 – Choice or Necessity, Burden or Benefit?* London: Third Age Employment Network.

¹⁴ Beatty, C. & Fothergill, S. (2002). *Moving Older People into Jobs*. London: Third Age Employment Network.

¹⁵ Beatty, S., Fothergill, S., Gore, A., & Herrington, A. (1997). *The Real Level of Unemployment*. Sheffield: Sheffield Hallam University.

¹⁶ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DfES.

¹⁷ Department for Work and Pensions (2002). *Pathways to Work: Helping People into Employment*. Cm 5690. London: Stationery Office

¹⁸ Heap, D. (2004). Redundancies in the UK: an update of previous analyses of redundancies in the UK in relation to age, sex, industry and region, *Labour Market Trends*, 112 (7).

¹⁹ Beatty, S., Fothergill, S., Gore, A., & Herrington, A. (1997). *The Real Level of Unemployment*. Sheffield: Sheffield Hallam University.

²⁰ Third Age Employment Network (2003). *Key Facts on Age Diversity and Employment*. London: TAEN.

²¹ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DfES.

²² Third Age Employment Network (2003). *Key Facts on Age Diversity and Employment*. London: TAEN.

population will have grown by two million and the number of under-50s in the population will have fallen by a similar amount.²³ There are serious economic implications unless employer, community and individual attitudes can be reversed.

The cost of third-age unemployment

- 1.5 The cost of third-age unemployment to the economy is massive. The GDP loses at least £16 billion a year and between £3-5 billion in benefit costs, taxes and national insurance²⁴. In a recent report, Age Concern has estimated that annual economic output could rise by as much as £29.7 billion if up to a million older adults rejoined the workforce²⁵. These figures do not include the hidden health-related costs of inactivity.

Utilising the skills and potential of adults aged 45+

- 1.6 In 2003, 20% of job vacancies in England remained unfilled because of a lack of skilled applicants of all ages: some 135,000 vacancies²⁶. In terms of skill levels and experience, many of these vacancies could have been filled by older adults. Many 45+ have highly developed skills that are in high demand and represent skill shortage areas. These include: specialist professional, technical and craft skills; people skills (including communication and customer care); and management and supervisory skills. Personal values often mean that the 45+ are reliable, committed and have a strong work ethic, all qualities prized by employers²⁷.
- 1.7 In the Annual Lecture (2001) to the Centre for Guidance Studies at the University of Derby, Chris Humphries, Director General, City & Guilds of London Institute, stated that:
- ‘Recent major research²⁸ confirmed the increasing trend for employers to move away from narrow occupational classifications for many employees towards generic job titles against customised skill sets, often mixing occupationally specific skills with IT, management, marketing, customer care or other cross-cutting skills’²⁹.
- 1.8 These and other equivalent skills, often necessitating skills in managing and relating to people, are among those which many adults aged 45+ have developed through age and experience, but which have been discarded through redundancy or overlooked through lack of training and age discriminatory attitudes in the workplace.
- 1.9 Demographic changes mean that employers need to make much greater use of these and other skills and qualities to enable the economy to thrive and develop. By 2010 almost 40% of the workforce will be 45+³⁰. Conversely the number of young people under 16 continues to decline; the UK birth rate has fallen to 1.6 per woman, which is well below population-replacement levels³¹.

Regional differences

- 1.10 The circumstances of individuals and groups aged 45+ can differ considerably. There are substantial differences between regions in terms of job shortages and unemployment. For example, in Spring 2002 78% of men and 62% of women aged 50-64 were employed in the South East, compared with 55% of men and 48% of women in the North East. Within regions there are pockets of persistently high unemployment where older workers are often particularly affected (in January 2002 the two districts with the highest overall unemployment rates were Merthyr Tydfil (28.2%) and Easington, Co. Durham (24.3%)³². In the regions and areas of highest unemployment, special initiatives are often required

²³ Strategy Unit (Cabinet Office Performance and Innovation Unit) (2000). *Winning the Generation Game: Improving Opportunities for People Aged 50-65 in Work and Community Activity*. London: Cabinet Office.

²⁴ *Ibid*, page 5.

²⁵ Age Concern (2004). *The Economy and Older People*. London: Age Concern England.

²⁶ Learning and Skills Council (2004). *National Employer Skills Survey: Key Findings*. Coventry: LSC.

²⁷ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DfES.

²⁸ Institute for Employment Research (2001). *Employer Skills Survey, 2001*. Warwick: IER, University of Warwick.

²⁹ Humphries, C. (2002). *Skills, Work and Lifelong Learning: the Role of Guidance*. Derby: Centre for Guidance Studies, University of Derby.

³⁰ Age Positive (2002). *Being Positive about Age Diversity at Work: a Practical Guide for Business*. Sheffield: Department for Work and Pensions.

³¹ Third Age Employment Network (2003). *Key Facts on Age Diversity and Employment*. London: TAEN.

³² Beatty, C. & Fothergill, S. (2002). *Moving Older People into Jobs*. London: Third Age Employment Network.

with integrated guidance provision to support, motivate and encourage older adults to take advantage of the options available – including retraining, intermediate labour market programmes, and opportunities for paid work^{33 34}.

The skills and lifelong learning agendas – meeting the targets

- 1.11 Although many adults aged 50-64 have highly developed skills and experience currently lost to the economy, learning requirements are higher than for younger age groups. For example, a third of 50-64 year-olds have literacy and numeracy problems compared with one fifth of 26-35 year-olds. Among those who are economically active, 37% of 50-64 year-olds are not qualified to level 2, compared with 27% of 20-34 year olds³⁵. Some 40% of the population on IB have no qualifications at all; and over 40% of IB claimants are 50+³⁶.
- 1.12 The Government's PSA target provides for 1,500,000 adults to achieve a basic skills qualification by 2007. This figure is well below the figure of 26 million people assessed as having weaknesses in literacy and numeracy. Even so, the figure is challenging and will require extensive outreach activity in workplaces and local communities³⁷. Attracting much greater numbers of older adults into basic skills learning is likely to prove essential in order to reach the Government's targets. There are also strong economic reasons for doing so. NIACE has constantly highlighted the persistence of a learning divide between the educationally privileged and the learning poor, now exacerbated by the digital divide. Poor basic skills levels and IT skills are synonymous with poverty and low industrial productivity, and continuing exclusion of individuals and communities from economic and social progress and development³⁸.

The individual costs of third-age unemployment

- 1.13 The costs of third-age unemployment for individuals impact on the whole economy. Many of the workless 50+ live in considerable poverty – well over half are in households without occupational pensions and 40% of these are in the lowest 20% of income distribution³⁹. Poverty and unemployment erode health and self-esteem. Many of the 45+ worry about breaks in their pensions contributions, erosion of saving, and incipient and future poverty. Many want to work, for individual fulfilment and because they want to contribute to their communities, as well as for financial reasons. Individual consciousness of waste – of skills, abilities and experience – is frequently acute. Many – including the better off – describe themselves as 'retired' to protect their status, but would prefer to work if they could do so⁴⁰.

Utilising older people's skills and experience – job satisfaction

- 1.14 Increasing numbers of older adults who are made redundant do not necessarily want to return to their previous occupations or work styles. This trend is consistent with the numbers of older adults who want to retire from their current employment, for reasons that include changing values at work, lack of worker loyalty and attachment, feeling undervalued, the target culture, travel-to-work problems, and frequent reorganisation.
- 1.15 Quality of jobs in terms of job content, and the scope available to use and develop individual skills and abilities, are seen by many older adults as critical factors⁴¹. As people age, personal values can increase in importance. The 45+ also have an increasing awareness of time running out. Redundancy may be seen as the opportunity for a new beginning – “if I don't make the break and do it now I never will”. A significant number of older adults don't just want to find 'a job' – they also wanted an occupation, or 'vocation', that allows them to express their (changing) values, interests and objectives,

and to progress. In some cases voluntary work may prove more in tune with their personal values than their previous paid employment. The extent to which they can afford to continue volunteering rather than remaining in or re-entering the paid labour market differ according to individual circumstances⁴².

Volunteering and older adults

(Note: official figures on the numbers of volunteers are only available nationally for formal volunteering and do not include the numbers of adults, including older adults, who are 'informal' carers and make important contributions to community life as 'good neighbours'. The 'unofficial' figures are extremely difficult, and probably impossible, to collect with any precision; therefore the official figures for volunteers should be read as reflecting general trends rather than as a wholly accurate measurement of the scale of altruistic behaviour within local communities.)

- 1.16 Although 40% of adults aged 55-64 volunteer, this is substantially below the national average for all ages, including those aged 65-74 where the proportion of volunteers rises to 45%.⁴³ There are a number of reasons for the decline in volunteering from age 55-64, including the continuing desire for paid work: for many (but not all) working for free is not a satisfactory substitute⁴⁴. The value of unpaid work by people over 50 to the economy (excluding the important roles of caring and grand-parenting) has been estimated at £5 billion annually. This is based on a total of 5.3 million volunteers aged 50+, including the 65+.⁴⁵ Given appropriate advice, guidance and encouragement, including support provided within local community agencies, there are strong indications from case studies that many more 50+ could be encouraged to volunteer⁴⁶.
- 1.17 There are some key issues here. Key conclusion 10 of the Cabinet Office Performance and Innovation Unit Report proposed that pilots should be introduced “to explore new ways of recognising and rewarding volunteering opportunities”⁴⁷. This recommendation is in line with practice in the United States where some older 'volunteers' are paid stipends to enable them to work on a more intensive basis, including full-time commitment⁴⁸. As the numbers of older adults continue to grow, it may prove advisable to look again at how greater numbers – and especially those at the top end of the age scale aged 60+ living on benefit and in deprived communities with little hope of alternative employment – might be encouraged and enabled to volunteer and/or work in the 'intermediate labour market' on a continuing basis (not only as a short-term option within New Deal) and be given some recompense for the valuable work undertaken.

Ethnic minorities

- 1.18 Older adults from ethnic communities are particularly affected by unemployment. Compared with white 50-64 year-olds, black men of the same age are a third more likely, and Indian, Pakistani and Bangladeshi men two-thirds more likely, to be out of work. In Asian communities less than half of older men and less than a third of older women are in work^{49 50}. Older people from ethnic minorities often need particular help and support in regaining motivation, obtaining suitable work, and understanding the potential value of lifelong learning (especially when they may be sceptical about the chances of employment following course completion)⁵¹.

Third-age unemployment, learning and health

- 1.19 There is a clear link between high unemployment and the numbers of older adults claiming IB, demonstrated by regional IB claimant figures which increase in line with regional levels of unemployment⁵². Non-workers aged 50+ are 50% more likely to die of

³³ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DFES.

³⁴ Nathan, M. (2000). *In Search of Work: Employment Strategies for a Risky World*. London: Work Foundation.

³⁵ House of Lords Select Committee on Economic Affairs (2004). *Aspects of the Economics of an Ageing Population Volume 1 - Report, HL 179-1*. London: Stationery Office.

³⁶ National Employment Panel Skills Advisory Board (2004). *Welfare to Workforce Development*. London: National Employment Panel.

³⁷ National Institute for Adult Continuing Education (2004). *Lifelong Learning and the Spending Review*. Leicester: NIACE.

³⁸ *ibid*.

³⁹ Third Age Employment Network (2003). *Key Facts on Age Diversity and Employment*. London: TAEN.

⁴⁰ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DFES.

⁴¹ Grattan, P. (2003). *Work after 60 – Choice or Necessity, Burden or Benefit?* London: Third Age Employment Network.

⁴² Learning and Skills Council (2003). *Challenging Age: Executive Summary*. Coventry: LSC.

⁴³ Strategy Unit (Cabinet Office Performance and Innovation Unit) (2000). *Winning the Generation Game: Improving Opportunities for People Aged 50-65 in Work and Community Activity*, page 26. London: Cabinet Office.

⁴⁴ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Full Report and Appendices 1-7. Sheffield: DFES.

⁴⁵ Age Concern (2004). *The Economy and Older People*. London: Age Concern England.

⁴⁶ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Full Report and Appendices 1-7. Sheffield: DFES.

⁴⁷ Cabinet Office Performance and Innovation Unit (2000). *Winning the Generation Game: Improving Opportunities for People Aged 50-65 in Work and Community Activity*, page 7. London: PIU (now the Strategy Unit).

⁴⁸ Freedman, M. (1999). *Prime Time: How Baby Boomers Will Revolutionise Retirement and Transform America*. New York: Public Affairs.

⁴⁹ Strategy Unit (Cabinet Office Performance and Innovation Unit) (2000). *Winning the Generation Game: Improving Opportunities for People Aged 50-65 in Work and Community Activity*. London: Cabinet Office.

⁵⁰ Economic and Social Research Council (2004). *Growing Older Programme. Project Summaries*. Swindon: ESRC.

⁵¹ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DFES.

respiratory diseases and experience depressive disorders than those in work, and three times more likely to visit the doctor⁵³. They are also less likely to participate in other activities including volunteering, caring and learning^{54 55}.

- 1.20 Research conducted by the Centre for Research on the Wider Benefits of Learning has found positive correlations between learning and health, including:
- The adoption of positive health behaviours such as reduction in smoking and alcohol consumption, increase in exercise and adoption of better diet, all of which reduce national health-care costs.
 - Increases in occupational self-direction, self-esteem, self-fulfilment and financial security – which are concomitants of occupational success.
 - Development of autonomy, problem solving skills, social competence, and a sense of purpose and optimism for the future – which promote individual occupational fulfilment and good citizenship.
 - Promotion of social responsibility, social values and social skills – which facilitate social cohesion and positive involvement by individuals in the local community.⁵⁶
- 1.21 The effect that education has upon improved individual health, therefore, has clear economic benefits. Research into the effectiveness of NICEC's Prescriptions for Learning initiative, which has involved medical practitioners in referring suitable patients – many of whom are 45+ – for guidance and learning, has shown similar positive benefits. The majority of patients referred to guidance workers have subsequently entered learning. All of these felt that learning has made a difference to their lives, especially in terms of their mental health^{57 58}.
- 1.22 National expenditure on each person receiving IB averages approximately £5,000 in the first year (combining IB with average expenditure per capita on NHS health care), and in many cases will be substantially higher. If only 100,000 of adults aged 50+ who are claiming IB as a result of prolonged unemployment could be supported back to work, this could save the economy well over £50 million in benefit and health care costs alone, without calculating the gains in tax revenue, improved consumption levels and economic productivity⁵⁹.

Third-age unemployment and consumer demand

- 1.23 By 2020 the numbers of 50-64 year olds in the UK will rise by three million; currently the birth rate is falling and there are now more people aged over 60 than under 16 in the population⁶⁰. If the numbers of adults aged 50-64 who are unemployed continue to grow in proportion with the increase in the 50+ population (currently a third of the age group is not earning), then ever-greater numbers of the population living in comparative poverty will act as a break on the consumption of products and services, and therefore on national economic health and development⁶¹.

⁵² Beatty, C. & Fothergill, S. (2002). *Moving Older People into Jobs*. London: Third Age Employment Network.

⁵³ Third Age Employment Network (2003). *Key Facts on Age Diversity and Employment*. London: TAEN.

⁵⁴ Nathan, M. (2000). *In Search of Work: Employment Strategies for a Risky World*. London: Work Foundation.

⁵⁵ Carlton, S. & Soutby, J. (1999). *Learning to Grow Older and Bolder*. Leicester: NIACE.

⁵⁶ Hammond, C. (2002). *Learning to be Healthy*. London: Centre for Research on the Wider Benefits of Learning, Birkbeck College.

⁵⁷ Hughes, D., Bosley, S., Bowes, L. & Bysshe, S. (2002). *The Economic Benefits of Guidance*. Derby: Centre for Guidance Studies.

⁵⁸ James, K. (2001). *Prescriptions for Learning: Evaluation Report*. Leicester: National Institute for Adult Continuing Education.

⁵⁹ Hughes, D. (2004). *Investing in Career: Prosperity for Citizens, Windfalls for Government*. Winchester: Guidance Council. (This important paper is currently only available on the Guidance Council website: publication is expected shortly.)

⁶⁰ Cabinet Office Performance and Innovation Unit (Strategy Unit) (2000). *Winning the Generation Game: Improving Opportunities for People aged 50-65 in Work and Community Activity*. London: Stationery Office.

⁶¹ Rifkin, J. (2004). Return of a conundrum, in *The Guardian*, 2 March.

2 Career Guidance: What is Needed

What is career guidance?

- 2.1 A recent OECD report on career guidance and public policy⁶² defines career guidance (a more explicit term than simply 'guidance') as follows:

'Career guidance refers to services intended to assist people, *of any age and at any point in their lives* (emphasis added), to make educational, training and occupational choices and to manage their careers. Career guidance helps people to reflect on their ambitions, interests, qualifications and abilities. It helps them to understand the labour market and education systems, and to relate this to what they know about themselves. Comprehensive career guidance tries to teach people to plan and make decisions about work and learning. Career guidance makes information about the labour market and about educational opportunities more accessible by organising it, systematising it, and making it available when and where people need it.'

- 2.2 The Report continues:

'While personal interviews are still the dominant tool, career guidance includes a wide range of other services: group discussions; printed and electronic information; school lessons⁶³; structured experience; telephone advice; and on-line help. Career guidance is provided to people in a very wide range of settings: schools and tertiary institutions; public employment services; private guidance providers; enterprises; and community settings.'

- 2.3 The OECD report's emphasis on the wide range of services involved in effective guidance delivery is crucially important. Career guidance is a multi-faceted process to help people make well-informed and individually appropriate life decisions, and especially in relation to work and learning. Within learning, guidance has been succinctly defined as 'that essential component of education and training which focuses on the individual's personal relationship with what is to be learned'⁶⁴. The personal relationship may include action planning and individual career development.
- 2.4 (Note: the term 'career' (with no letter 's') is used in the sense of an individual's journey through life, particularly in respect of work and learning. No class distinctions are implied in respect of those who have 'work' and those who have 'careers', although some policy-makers have suggested this is the case. In practice, many individuals aged 45+, irrespective of background, welcome the opportunity to tell their personal stories. This is why narrative approaches to guidance, which enable the client and practitioner to work together in identifying significant features in the life journey including unrecognised areas of skill and unfulfilled potential, can prove so suitable in work with older adults – subject to the necessary time and resources.)
- 2.5 In England in particular, the term 'guidance' is frequently misunderstood by the general public – and crucially, in terms of national policy development, by policy-makers as well^{65 66}. Attitudes towards guidance provision at national level are therefore ambivalent, and those who speak for guidance nationally have to work hard to ensure that guidance

⁶² Organisation for Economic Co-operation and Development (2004). *Career Guidance and Public Policy: Bridging the Gap*. Paris: OECD.

⁶³ Author's note: for adults, comparable services include group work in career management and employability skills.

⁶⁴ Unit for the Development of Adult Continuing Education (1986). *The Challenge of Change: Developing Educational Guidance for Adults*. Leicester: NIACE. Republished in 2003 by the National Association for the Educational Guidance for Adults, edited by Jonathan Brown.

⁶⁵ Bayliss, V. (1999). *Joined-Up Guidance. Where Do We Go From Here?* CeGS Annual Lecture. Derby: Centre for Guidance Studies, University of Derby.

⁶⁶ Ford, G. (2002). Connexions for Adults: Working towards All Age Guidance partnerships, in *Career Guidance: Constructing the Future*. Stourbridge: Institute of Career Guidance.

remains firmly on the agenda. In some government departments in England, the concept of ‘guidance’, and therefore the term, has become a taboo and has to be disguised with periphrases such as ‘in-depth advice’ and ‘enhanced services’. This is despite a considerable body of evidence that the public welcomes guidance, and that guidance services are effective in enabling individuals to make well-informed decisions on work and learning, to the benefit of the economy and communities⁶⁷. The same level of scepticism is not apparent in Scotland, Wales or Northern Ireland, nor throughout Europe, the US, Canada, Australia, New Zealand, and the many other developed and less-developed nations where the development of guidance provision is seen as a central element in their economic and workforce development strategies⁶⁸.

‘Information’, ‘advice’ and ‘guidance’

- 2.6 A main factor contributing towards the misunderstanding is the administrative division in England of ‘guidance’ into three separate elements: *information* (the provision of information on learning, work and related areas made available to the public through a number of communication channels); *advice* (helping individuals to interpret the information, and lasting no longer than 20 minutes); and *guidance* (professionally conducted in-depth one-to-one interviews and assessments of an hour or more duration, that help clients to explore a range of options, relate information to their own needs and circumstances, and make decisions about their career in terms of progression in learning and work).⁶⁹ The division of the guidance process into ‘I’, ‘A’ and ‘G’ was originally formulated in the early 1990s when the future funding of adult guidance was under threat. The division of guidance into three separate elements enabled the cheaper ‘information’ and ‘advice’ to be provided free through state funding, and the more expensive ‘guidance’ to be available free for certain key target groups of adults and purchasable by the rest. The device proved successful in preventing the demise of adult guidance, although in the event few adults were prepared to pay for the in-depth element, which remains imperfectly understood.
- 2.7 Unfortunately the legacy of ‘I, A, G’, valuable at the time, has bequeathed a limited concept of adult guidance in England which could – some would argue, already is – having detrimental economic and social consequences. Many adults, including older adults, continue to under-function in learning and in work. Many also fail to relate key aspects of government policy, for example lifelong learning, to their own personal situations and requirements. Effective guidance breaks through individual and community isolation, helps people to understand how the available opportunities and options relate to their own individual situations, and supports them in overcoming the personal barriers that may be preventing them from working, learning and attaining greater personal fulfilment.
- 2.8 There is now an acute need to remove any remaining mystique from guidance, and ensure that the activities that help people to make well-informed decisions on work, learning and their individual journey through life (i.e. ‘career’), are fully understood by policy-makers and public alike. For example, older adults may not understand the term ‘guidance’ but they do understand the purposes of ‘skills assessment’ and ‘work experience’, both potentially key activities in helping the 50+ make informed decisions about choice of employment and return to work. Unfortunately, the current confusion about semantics can mean that these and other essential activities of guidance, are disregarded and drop out of the framework of recognised provision. The debate becomes centred on the semantics, i.e. the differences between ‘information’, ‘advice’ and ‘guidance’.
- 2.9 For guidance practitioners, ‘guidance’ is a generic word, which encompasses a range of related activities, including ‘information giving’ and ‘advice’, and is not an ‘activity’ in its

own right. This means that distinguishing ‘advice’ from ‘guidance’ is at root a futile business, equivalent to drawing distinctions between the *generic process* of ‘education’ and its many *component activities* such as ‘reading’, ‘listening’, ‘memorising’ and so on. Unfortunately the current confusion in England (but not in the other countries of the UK or the developed world) about the semantics of guidance threatens the future of English guidance provision itself. At a time of rapid change in an increasingly complex world, guidance can be seen to be both a public and a private good, and the economy, community and individuals of all ages stand to suffer accordingly⁷⁰.

Third-age demand for guidance and support

- 2.10 Older adults who have experienced high-quality guidance services report positively on their value in remotivating them and providing them with new hope, making them aware of opportunities, and helping individuals – many of whom feel excluded on grounds of age – to become re-included in work and community⁷¹.
- 2.11 Main barriers facing older adults can include: local job shortages; conscious or unconscious age discriminatory practices by employers and younger work colleagues; awareness of unused potential without necessarily being able to identify its direction or scale; desire for a second chance or career transition but not knowing how to set about this; difficulty in locating and affording suitable training; experience of rejection and isolation; loss of self-confidence and erosion of morale; financial difficulties; and not knowing what to do⁷².
- 2.12 Many older adults do not know where to turn for assistance, and skilled help in many geographical areas – especially so in England where adult guidance is currently not as well developed as it is in Scotland, Wales and (increasingly so) Northern Ireland – is in short supply. The fast pace of economic and social change means that many adults aged 45+ of all ability and educational levels (manual, craft, technical, managerial, professional) want expert help and support in overcoming individual barriers and establishing personal direction, so that they can contribute positively to the economy and their communities^{73 74}.
- 2.13 Older adults who have experienced guidance identify the following guidance activities and services as especially helpful:
- *Accessible, personally relevant, up-to date and detailed information* to help them: identify suitable local opportunities (jobs, learning, volunteering); obtain background knowledge on finance, benefits, self-employment and active retirement; make informed decisions and choices; and locate local organisations that can help.
 - *Expert advice and guidance* that enables them to relate the information to their own circumstances. Some older people bring considerable ‘personal baggage’ to the guidance process, and wherever possible the guidance should be *holistic*.
 - *Expert advice on financial issues* (including: any individual financial advantages that may result from continuing in work including increased savings and pensions; and how to avoid the benefits trap) and *self-employment*.
 - *Skilled assessment* – including identification of: occupational and transferable skills, aptitudes and experience; previously unrealised potential; and preferred

⁶⁷ Bysshe, S., Hughes, D. & Bowes, L. (2002). *The Economic Benefits of Career Guidance: a Review of Current Evidence*. Derby: Centre for Guidance Studies, University of Derby.

⁶⁸ Organisation for Economic Co-operation and Development (2004). *Career Guidance and Public Policy: Bridging the Gap*. Paris: OECD.

⁶⁹ Learning and Skills Council (2002). *Operating Plan (Section 8 – Information, Advice and Guidance)*. Coventry: LSC.

⁷⁰ See Watts, A.G. & Hawthorn, R. (2004). The IAG National Policy Framework: a Critique and a Way Forward. *NAEGA News and Views*, Spring. This paper provides an acute analysis of the detrimental effects that misunderstandings about the semantics of guidance are having on the quality, content, scale and availability of IAG provision in England.

⁷¹ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Full Report and Appendices 1-7. Sheffield: DfES.

⁷² *Ibid*, throughout all sections of the Report and Appendices.

⁷³ Department for Education and Skills (2001). *Training Older People*. QPID Study Report No. 91. Sheffield: DfES.

⁷⁴ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DfES.

learning styles. Older adults tend to appreciate the use of psychometric assessment instruments.

- *Computer-aided guidance packages* (for example, CASCAiD's popular and extensively used Adult Directions programme) and *information on relevant websites*. These can assist: personal 'stocktaking'; establishing direction; gaining/regaining the self-knowledge needed to make sound career decisions; action planning; and job-search more generally.
- Skilled help in *relating individual skills, aptitudes and experience to the changing labour market and needs of the local community*. This may necessitate support in drawing up and implementing *personal action plans*.
- Coaching in *personal presentation, writing CVs, interview techniques, jobsearch and self-advocacy*. Many 45+ also need help in techniques and approaches that can help them overcome age stereotyping and hidden or overt discrimination.
- *Training and career development opportunities* that provide them with the skills required by local employers, and which they can afford.
- Opportunities for *work trials, work sampling and work experience* so that they can act as their own ambassadors, try out their skills, find out about unfamiliar occupations, and prove themselves to employers.
- Opportunities to form *peer group support networks*. Peer support can prove invaluable in helping individuals to: regain confidence and motivation; re-establish direction; implement action plans; obtain work; progress in learning; and achieve personal objectives.
- Guidance workers with highly developed *mentoring skills* who are *genuinely client-centred*, listen, motivate and encourage, and have the ability to act as 'sounding boards' and 'sources of ideas'.
- Guidance workers with *detailed and expert knowledge of local labour markets*, who are able to *influence the attitudes of local employers in favour of employing older adults*. (Knowledge of local learning opportunities in isolation from detailed knowledge of local labour markets is not seen as sufficient.)

2.14 All these guidance activities and services are about helping adults aged 45+ to assess and where necessary re-orientate their lives, establish a sense of personal direction, and optimise the contributions they can make to the economy and their local communities⁷⁵. They are also about helping older adults to acquire *career management skills*, which they often lack because they have had no previous opportunity to develop these skills. Career management skills can help individuals to cope more successfully with changes in the workplace and with redundancy and unemployment, and to understand the importance of lifelong learning, including the need to continually develop and extend personal and occupational skills.

2.15 Significantly, the support requirements of many older people parallel the needs of the priority groups of disadvantaged young people aged 13-19 served by Connexions Partnerships. Individuals who are socially excluded often have identical guidance and mentoring requirements, irrespective of age⁷⁶. Many older adults – whether employed, unemployed or prematurely retired – experience degrees of social exclusion in the workplace and local community on grounds predominantly of age, an experience they

share with numbers of young people. Once excluded, the barriers and issues frequently multiply and skilled help is required to enable these to be overcome.

Guidance and older adults: positive outcomes

2.16 Guidance services that older adults find particularly helpful are mainly highly personalised and people-focused initiatives combining most or all these activities into an integrated service⁷⁷. A number of services are highly successful in achieving both 'hard' and 'soft' outcomes. For example, information provided by Experience Works! (Loughborough College), New Challenge (Wembley), and Target Third Age York in March 2004 indicates that (depending on the providers' location and main client groups) between 33% and 62% of clients enter work, and the majority of the remainder enter voluntary work and/or continue with education and training, followed in a number of cases by entry into paid work. Since the research was conducted, Experience Works! at Loughborough College has closed. However, at the time of the research all three agencies were specialist and expert guidance providers offering a wide range of services and were highly regarded by their older clients. The success of these and similar initiatives is highly dependent on extensive local networks, and close relationships with both employers and learning providers⁷⁸.

2.17 However, many providers do not have the resources to provide a full range of guidance and learning activities and services without external assistance, and a partnership approach is required. This may also apply to the small number of employers who provide varying levels of career guidance support within industry, including small and medium-sized employers (SMEs) without dedicated HR departments.

Guidance and older adults: feedback to policy-makers

2.18 Many guidance workers are well placed to provide informed feedback to policy-makers on local labour market changes and requirements, and on gaps in education and training provision – including training in skills to equip older adults to meet skill shortage areas. Front-line guidance workers also have direct knowledge of the barriers that prevent older adults from obtaining suitable work and progressing.

2.19 'Grassroots' micro-economic knowledge and experience is – or should be – essential to inform macro-economic decision-making at national level. Guidance workers are acutely aware from their front-line experience that national, regional and local strategies to create opportunities and options can under-perform or fail because policy-makers have taken insufficient account of the myriad psychological, circumstantial and environmental factors that influence individual decision-making. Efficient mechanisms are required to ensure that this front-line knowledge, which includes in-depth knowledge and experience of third-age learning and work issues, is fed back to the policy-making bodies.

Advocacy on behalf of older adults

2.20 Some guidance workers have acted as successful advocates for older adults, by informing employers about the consequences of demographic change and helping to create opportunities in local industry, and by organising events in which the issues are discussed and local action planned⁷⁹. In some cases this has been in association with Jobcentre Plus, which is a key stakeholder in IAG Partnerships.

2.21 Guidance workers should be able to work simultaneously on demand factors (i.e. creating opportunities, including opportunities in local industry) as well as supply factors (i.e. working with individuals to help them make well-informed and personally relevant decisions) in order to optimise the contribution of IAG to the national skills strategy and

⁷⁵ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DFES.

⁷⁶ Ford, G. (2000). *The Connexions Strategy and All-Age Guidance*. Derby: Centre for Guidance Studies, University of Derby.

⁷⁷ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DFES.

⁷⁸ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups: Annex 7: Third Age Specialist Organisations*. Sheffield: DFES.

⁷⁹ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DFES.

ensure that guidance is genuinely effective. Feedback from third-age events in the East Midlands and North Yorkshire, aimed simultaneously at employers and older adults, shows that these events can be highly effective in influencing local attitudes in favour of employing greater numbers of older workers⁸⁰.

The international perspective

- 2.22 In 2001 OECD commenced a strategic and wide-ranging review of career guidance policies in 14 OECD countries. The value of the initiative led to parallel reviews being conducted by the European Commission and the World Bank, and a total of 37 developed and middle-income countries were covered world-wide.
- 2.23 A main finding from the studies is that guidance provision targeted at older employed, unemployed and inactive adults, is poor or non-existent in almost all countries. One paragraph from the OECD final report, *Bridging the Gap*, merits quotation in full because of its perceptiveness and because the observations are based on evidence world-wide.
- ‘A gap that is evident in many countries is the limited scope of career guidance for older adults and for the ‘third age’. In the United Kingdom, recent reviews of guidance for the third age have revealed a wide range of disconnected provision (Ford, 1997⁸¹; DFES, 2003⁸²). Many countries are concerned about their ageing population and the problems this is increasingly posing for increased health and old age security expenditure. To relieve the pressures on public resources, policies are being developed to maintain employment among older workers and promote their re-entry into the labour market. This can be linked to encouraging more flexible approaches to managing the transition to retirement. It can also be linked to encouraging those who have left the labour market to continue their involvement in learning and in voluntary work in the community, so reducing health bills and harnessing their social contribution Policy responses to ageing societies in most OECD countries have, to date, largely focused upon reforms to retirement age provision and reformed income support arrangements. There are strong arguments for public policy seeking stronger links between these reforms and the availability of career guidance to help people to create more flexible transitions to retirement. In particular, a much closer integration between financial planning and career guidance, as well as overall retirement planning, could assist people to put together more flexible mixes of temporary employment, part-time work, and self-employment during the transition to retirement.’⁸³
- 2.24 These observations are reinforced by the CEDEFOP synthesis report on career guidance in the European Union, *Guidance Policies in the Knowledge Society*⁸⁴, which considers the gaps in guidance provision for older adults that exist throughout Europe. The report states unreservedly that ‘..... guidance is called upon to assist in the Union’s goals of increasing labour force participation and of promoting active ageing by creating a supportive environment in an effort to integrate the inactive, the unemployed and older workers into the workforce’⁸⁵.
- 2.25 The combined impact of the three international and European projects, and the reports they have generated, has helped to provide the impetus behind the Resolution of the Council of the European Union on ‘Strengthening Policies, Systems and Practices in the Field of Guidance Throughout Life in Europe’⁸⁶. This Resolution was passed unanimously by all the member states in May 2004. The emphasis throughout the resolution is on lifelong guidance that “contributes to the achievement of the European

Union goals of economic development, labour market efficiency and occupational and geographical mobility by enhancing the efficiency of investment in education and vocational training, lifelong learning and human capital and workforce development.” Direct reference is made to older workers within the context of ‘groups affected by sectoral restructuring’, necessitating changes in the nature of their employment. The Resolution is a most important step forward because it recognises and emphasises the key role of guidance within the economic development strategies adopted by member states.

- 2.26 The Resolution is also remarkable because its definition of career guidance reinforces the multi-activity nature of effective guidance, and contrasts starkly with the narrow conception of career guidance prevalent in the higher echelons of policy-making in England. The Resolution reads:
- “In the context of lifelong learning, guidance refers to a range of activities that enables *citizens of any age and at any point of their lives* (author’s italics) to identify their capacities, competences and interests, to make educational, training and occupational decisions and to manage their individual life paths in learning, work and other settings in which these capacities and competences are learned and used.”
- 2.27 In a footnote the resolution lists examples of guidance activities including information and advice giving, counselling, competence assessment, mentoring, advocacy, teaching decision-making and career management skills, all of which are highly relevant to older adults.
- 2.28 The Resolution places guidance at the centre of the EC’s economic, learning and social inclusion strategies and needs to be widely read, discussed, understood and acted upon – in the interests of all citizens, including older age groups.

⁸⁰ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DFES.

⁸¹ Ford, G. (1997). *Career Guidance in the Third Age: a Mapping Exercise*. Cambridge: NICEC.

⁸² Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DFES.

⁸³ Organisation for Economic Co-operation and Development (2004). *Career Guidance and Public Policy: Bridging the Gap*, page 68. Paris: OECD.

⁸⁴ Sultana, R.G. (2004). *Guidance Policies in the Knowledge Society: Trends, Challenges and Responses across Europe*. CEDEFOP Panorama series: 85. Luxembourg: Office for Official Publications of the European Communities.

⁸⁵ *Ibid*, page 62, section 5.3.

⁸⁶ Council for the European Union (18 May 2004). *Resolution of the Council and of the Representatives of the Member States Meeting within the Council on Strengthening Policies, Systems and Practices in the field of Guidance throughout Life in Europe*. EDUC 109 SOC 179. Brussels: Council of the European Union.

3 Career Guidance: Provision

- 3.1 This section considers career guidance provision for older adults in relation to the main providers. A number of publications, including key UK government documents, have emphasised the centrality of guidance within effective learning provision – before entry, as learning progresses, and (a key stage far too often overlooked) at the point of exit in terms of skills utilisation and further progression, i.e. lifelong learning⁸⁷. This section also stresses the key relationship that exists between guidance, work (both paid and unpaid), work-life balance, and individual fulfilment at all stages of life.

Jobcentre Plus

Feedback

- 3.2 Jobcentre Plus is the biggest provider of information, advice and guidance services in the UK, although this is often unrecognised even by management and staff working within the national employment service. Feedback from 45+ participants in the Challenging Age research programme on their experiences of guidance⁸⁸ shows that many older adults associate guidance initially with Jobcentres, which is often the first helping agency they visit after being made redundant. Unfortunately much of the feedback received during the research programme was negative. In particular, older adults considered that front-line staff have insufficient time to listen to the needs of the clients, and are concerned principally with their own agenda defined in terms of placement targets. Those older adults who were hoping for advice on learning and career development expressed concern that many front-line staff wanted to submit them to vacancies, irrespective of the extent to which the jobs would help each individual to meet her/his personal objectives. For many older adults, redundancy presents the opportunity for a new start, and therefore they want the opportunity to explore possibilities with an empathetic and specialist adviser.

Programmes and initiatives

- 3.3 In practice, Jobcentre Plus is providing, or developing, more initiatives to assist older adults than the vast majority of helping agencies, and especially so for those with limited or no qualifications. Some of these initiatives are directly targeted at older age groups; others are for all adults irrespective of age, or targeted at specific groups that include a high percentage of 45/50+. These initiatives include the following:
- (i) *New Deal 50 Plus* – this programme was introduced in April 2000, since when it has helped over 110,000 older adults to move from benefits into work through work placements, training in self-employment, and the intermediate labour market. New Deal 50 Plus has proved particularly successful with the younger 50+ and ‘active’ benefit claimants.⁸⁹ The employment credit which until recently was paid directly to the client, and the opportunity the initiative provides to test out specific jobs and demonstrate one’s abilities to prospective employers, have proved particularly popular. Over half of New Deal 50 Plus clients are in the same work two years after starting, and there is evidence of significant increases in self-confidence.⁹⁰ However, there are indications that the New Deal 50 Plus is proving less popular with older age groups since the cessation of the employment credit and the incorporation of the programme within the working tax credit system, necessitating means testing to assess entitlement for continued benefits.

- (ii) *In Work Training Grant* – which is payable on request to New Deal 50 Plus clients once they are in work and enrolled on work-related training programmes. To date, however, only some 6% of New Deal 50 Plus clients have taken advantage of the Work Training Grants.⁹¹ This potentially valuable initiative needs to be more extensively marketed.
- (iii) *Work Trials*. Potentially, this programme could help many more 50+ to obtain work but is often overlooked by frontline staff working with older age groups⁹². Many older adults welcome opportunities for work experience and obtain offers of employment as a consequence, as a number of specialist third-age guidance and learning programmes have demonstrated^{93 94}. In common with New Deal 50 Plus, Work Trials offer older adults the opportunity to sample sometimes unfamiliar types of work and prove themselves to employers on a ‘two-way’ trial without losing their entitlement to benefits.
- (iv) *Programme Centres*. These may combine a number of services that can assist the older unemployed, including: basic skills, employability and motivational training; short or longer job-focused and occupational training; self-employment provision; one-to-one help; and opportunities to extend personal networks and apply for jobs. Older adults are often particularly appreciative of the personalised and tailored support that high-quality programme centres can provide, and which guarantee them individualised attention.⁹⁵
- (v) Initiatives that provide front-line staff and managers with greater flexibility to tailor help and support to meet the needs of each individual client. Main examples are:
- *Employment Zones* and *Action Teams for Jobs*, that enable staff to concentrate tailored help and support on social priority areas;
 - the *Pathways to Work* pilots to help people with disabilities into work and learning⁹⁶;
 - *New Deal for Disabled People*, which encourages innovation and flexibility in services for disabled people and is delivered by a network of job brokers from the public, private and voluntary services;
 - the *Adviser Discretion Fund*, which enables personal advisers to pay for items and facilities to remove practical barriers to work.

The initiatives have enabled Jobcentre Plus to experiment with approaches that provide much greater *flexibility for personal advisers* to listen to the needs of their clients, work in greater depth, and tailor provision to meet individual requirements. Research and feedback indicate that the programmes have succeeded in helping increased numbers of adults, including older adults, into learning and work⁹⁷.

- (vi) *Internal Jobcentre Plus Age Diversity groups* for staff who work at frontline and management level with older adults. These groups are now established in every Jobcentre Plus region. They meet together regularly under national senior management chairmanship to consider the most efficient methods and approaches to assist older adults and influence employers and other providers.

⁸⁷ The first national publication to make explicit the key role that high quality guidance plays within learning was the seminal NIACE/UDACE Report, *The Challenge of Change: Developing Educational Guidance for Adults* (1986). A more recent NIACE publication, which is an excellent practical guide to the central role that educational guidance should play within community-based learning, including learning for older adults, is Kathryn James’ and Christine Nightingale’s *Discovering Potential: a Practitioners’ Guide to Supporting Improved Self-Esteem and Well-Being through Adult Learning* (2004).

⁸⁸ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups: Annexes 1-7*. Sheffield: DfES.

⁸⁹ Atkinson, J. & Dewson, S. (2001). *Evaluating New Deal 50 Plus: Research with Individuals (Wave 1)*. Employment Service Research Report ESR 91. Sheffield: DWP.

⁹⁰ Department for Work and Pensions (2004). *Building on New Deal: Local Solutions Meeting Individual Needs*. Sheffield: DWP.

⁹¹ Moss, N. & Arrowsmith, J. (2003). *A Review of ‘What Works’ for Clients over 50*. Sheffield: DWP.

⁹² Department for Education and Skills (2001). *Training Older People*. QPID Study Report No. 91. Sheffield: DfES.

⁹³ Ford, G. (1997). *Career Guidance in the Third Age: a Mapping Exercise*. Cambridge: NICEC.

⁹⁴ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups: Annexes 7: Third Age Specialist Organisations*. Sheffield: DfES.

⁹⁵ Department for Work and Pensions (2004). *Building on New Deal: Local Solutions Meeting Individual Needs*. Sheffield: DWP.

⁹⁶ Department for Work and Pensions (2002). *Pathways to Work: Helping People into Employment*. Sheffield: DWP.

⁹⁷ Department for Work and Pensions (2004). *Building on New Deal: Local Solutions Meeting Individual Needs*. Sheffield: DWP.

- (vii) *Special events for employers, key partners and older clients.* Jobcentre Plus in North Yorkshire has been particularly successful in organising events for employers and key partners to help them appreciate the business value of employing a mixed-age workforce. North Yorkshire has also organised a careers event for older adults to enable them to meet potential employers. This was based on the successful AdvantAge third-age careers convention organised in the East Midlands under the umbrella of the East Midlands Development Agency Experience Works! series of initiatives.⁹⁸ These and similar targeted events are being extended to other Jobcentre Plus areas in England and Wales.
- (viii) *The Over 50s' Outreach Pilots* – which are being trialled in seven areas by a range of different organisations in order to make contact with the ‘hidden unemployed’. These include people aged 50+ who may have lost hope and motivation after constant rejection, and older adults with disabilities who want to work and/or are capable of working but need additional support and encouragement to enable them to do so.
- (viii) The *Worktrain* website – which enables users to search online for up-to-date information on vacancies, details of careers, training and learning, childcare and voluntary work. Worktrain also acts as a portal to the websites of a number of helping agencies, including some that provide services to assist older adults.

Unfortunately, the front-end of Worktrain has been restructured recently and is less user-friendly than it was previously. A further restructuring is required to ensure the website is genuinely client-centred, and therefore enables potential users from the various target groups (including older adults) to understand simply and directly how to use the site, and how the particular databases can assist and apply to them. For example, older adults are now offered a connection to the Age Positive website (which is aimed principally at employers, policy makers and key stakeholders and not at Jobcentre clients) and the opportunity to print out lengthy and highly coloured official guides for older adults in England, Scotland and Wales without explanation of what the guides contain or how they can help them. This aspect of Worktrain demonstrates a (hopefully temporary) lapse in the previous high standard of the site, and an unfortunate lack of understanding of the work and learning requirements and personal circumstances of many older users.

- (x) *Training resources for frontline staff in working with older adults* – these are of exceptional quality. Training resources include an excellent (but now outdated) open learning pack on New Deal 50 Plus⁹⁹, and a ‘Diversity Toolkit’, ‘*What You Need to Know – Age*’, which is available on the Jobcentre Plus intranet. However, feedback indicates that few staff know about these training resources nor have the time to use them. Some jobcentres (e.g. Scunthorpe) have adapted and used the LSC-financed training resources produced from the Challenging Age research project¹⁰⁰ to increase frontline and management understanding of the needs of older adults, and of the skills and approaches required to work effectively with them.

Welfare to Workforce Development

- 3.4 In 2003 the National Employment Panel was asked to review how collaboration between Jobcentre Plus and the LSC could be strengthened in order to take forward the Government’s Skills Strategy as set out in *21st Century Skills, Realising Our Potential*.¹⁰¹

The NEP is an employer-led body, which provides independent advice to Ministers on the design, delivery and performance of the UK Government’s labour market policies and programmes. The NEP’s recommendations are set out in the report *Welfare to Workforce Development*, presented jointly to the Secretaries of State for Work and Pensions, and Education and Skills.¹⁰² The recommendations have been welcomed and their broad thrust accepted. Some are seen as easy to implement; others could take more time and require the active collaboration of many organisations including employers, the Sector Skills Development Agency, the Sector Skills Councils, and learning providers in the statutory, private and voluntary sectors. The recommendations would bring the employment and learning strands of government policy together into a new partnership. This could, for example, help older redundant adults who want to improve their prospects through education and training but find themselves under pressure from Jobcentre staff to enter work that does not meet their personal objectives. Adults who have not attained level 2 qualifications stand particularly to gain from the recommendations.

- 3.5 NEP recommendations that could assist older adults to develop their careers through a planned combination of learning and work, include the following (the author’s observations are in brackets):

- (i) *Harmonisation of key Jobcentre Plus and LSC objectives and performance indicators*, including: job entry rates; skills and qualifications achieved; retention in work; and wage at entry. (To ensure this recommendation helps older adults, it would be advisable that objectives are included that are specific to older adults, and that performance indicators measure performance on an age-related basis).
- (ii) Changing the emphasis of Jobcentre Plus’s current target on *basic skills* from measurement of *client screening* (the first step in the process) to measurement of the *desired outcomes* through *skills achievement* (i.e. emphasis on actual results).
- (iii) Improving the quality and availability of *basic skills and ESOL training* through well-informed allocation of funding. (Many older adults from ethnic minorities, including many women, require high-quality ESOL programmes to enable them to escape isolation and stand a greater chance of inclusion in work, learning and the community.)
- (iv) Adjusting the benefit system to encourage and enable *individuals on benefit to take up training as a route back to work*. (This recommendation would help many older adults who need to reskill or upskill in order to regain full employability.)
- (v) Annual agreement between each LSC Director and Jobcentre Plus District Manager of a *joint delivery plan* setting out the key employment and skills priorities for the two organisations. (In most areas, demographic trends would indicate that the priorities should include older adults.)
- (vi) *Harmonisation of LSC/Jobcentre Plus contracting* – with the specific recommendation that the LSC takes responsibility for purchasing and managing basic skills and ESOL training, and that Jobcentre Plus develops an investment strategy to complement LSC provision and raise the standards and performance of its own contracted training delivery.
- (vii) Increased referral of Jobcentre Plus disadvantaged clients to *specialist in-depth guidance provision* (i.e. the IAG Partnerships in England, Careers Scotland, Careers Wales and the Careers Service or Educational Guidance Service for Adults in Northern Ireland. Although the recommendation specifies those without Level

⁹⁸ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*, pages 43–44. Sheffield: DfES.

⁹⁹ Employment Service (2000). *Older Workers: Open Learning Handbook*. Sheffield: Jobcentre Plus: Department for Work and Pensions.

¹⁰⁰ The LSC funded the development of a number of training aids for front line workers and managers working closely with adults aged 45+ on work and learning issues. A CD containing these resources can be obtained from the Third Age Employment Network, 207-221 Pentonville Road, London, N1 9UZ, telephone: 020 7843 1590.

¹⁰¹ Department for Education and Skills (2003). *21st Century Skills, Realising Our Potential*. Sheffield: DfES.

¹⁰² National Employment Panel (2004). *Welfare to Workforce Development*. London: NEP.

2 qualifications, many older adults face the additional handicap of being severely disadvantaged on grounds of age, irrespective of level of previous achievement. The age factor should also be taken into account in determining eligibility for referral to in-depth guidance.)

- (viii) The introduction of *systems that encourage individuals to complete their training and achieve qualifications when they enter work* – for example, through the introduction of a SMART card and a training record of achievement for low-skilled benefit recipients moving into work.
- (ix) *Improved collaboration between Jobcentre Plus and Business Link* so that staff in each organisation understand each other's products. (This recommendation could be of particular help to older adults who want training and support to help them start their own business.)
- (x) *A strengthening of partnerships* more generally between Jobcentre Plus and other relevant statutory, private and voluntary bodies, to increase the support available to help disadvantaged adults to work, learn and progress their careers. (Jobcentre Plus management and staff have often failed to network sufficiently closely with other helping agencies. This is partly a lack of sufficient time to find out about the local helping network and to refer. Many older adults require holistic guidance and support, and require referral to other specialist sources of help.)
- (xi) Lifting the age cap on *Modern Apprenticeships* from 25 so that Apprenticeships are available to all adult age groups (see paragraphs 4.48-4.50)¹⁰³.

The NEP's recommendations could do much to help greater numbers of older adults, and particularly the less qualified, to learn and work.

National employment services and career guidance

- 3.6 The wide range of the services and activities operated by Jobcentre Plus demonstrate the extent to which the national employment service is involved in delivering guidance, without management and staff necessarily recognising that a number of the services and activities are integral elements of effective guidance. The main missing elements in the Jobcentre Plus repertoire are in-depth career counselling and time to listen. For many older adults, career counselling is essential. This requires time with empathetic, highly-skilled and well-informed counsellors to explore individually suitable work, learning and life plans in the context of individual circumstances.
- 3.7 Most state-run employment services internationally have difficulty in balancing their gate-keeping responsibilities (including policing benefit entitlement and ensuring that clients are removed as quickly as possible from the unemployment register) with the requirements of their customers for client-centred guidance services.¹⁰⁴ In the UK, increased government emphasis on the gate-keeping role has rendered it more difficult for Jobcentre Plus to balance the policing responsibilities and the public's need for personalised provision. However, the introduction of initiatives that allow personal advisers greater flexibility in tailoring the support provided to clients, has enabled some geographical areas of Jobcentre Plus to offer genuinely client-centred provision. These initiatives have received a positive welcome from both public and staff.¹⁰⁵ Apparent sole concentration on organisational targets, to the detriment of client-centred services, has dissuaded numbers of older adults from revisiting jobcentres, and has almost certainly increased the numbers of the older 'hidden unemployed'.¹⁰⁶

- 3.8 Older adults have been particularly frustrated by the six-month eligibility requirement which applies to much of Jobcentre Plus's special initiatives, including New Deal 50 Plus, Work-Based Training, Programme Centres, and Work Trials¹⁰⁷ (paragraphs 4.60-4.65). Although it is possible for the six-month condition to be waived in particular circumstances, these are the exceptions rather than the rule.
- 3.9 There are important issues here. Some politicians and policy-makers in England in particular have considered whether 'information, advice and guidance' for adults might be best delivered through Jobcentre Plus. In order for such an arrangement to work in the interests of the public, it would be necessary to find a more effective balance between the gate-keeping and client-centred responsibilities of the Employment Service, including possible separation of the counselling function into a distinct service, as in Northern Ireland where the Careers Service – but not the Educational Guidance Service for Adults (EGSA) – is the responsibility of the Employment Service. Effective career counselling requires a trusting relationship between counsellor and client in which both parties are able to talk openly, and this is not easy to achieve where the counsellor or the agency in which the counsellor works may also be perceived as having a policing role.
- 3.10 Proper training in the necessary guidance and counselling skills and techniques is essential. In some countries, for example in the Netherlands, Korea and the Republic of Ireland, career counsellors within the public employment services increasingly need specialist qualifications at graduate or post-graduate level. In the Republic of Ireland, where nearly eight out of ten career counsellors working in the employment service have received guidance training, staff are encouraged to undertake a "part-time university course in adult guidance over a 12-month period, with their tuition fees and release time paid for, and with salary increments for those who successfully complete the course"¹⁰⁸.
- 3.11 Some national employment services provide career counselling services to individuals in employment to help them develop their careers, and work closely with industry to do so. Services to those in employment are very much in the interests of adults aged 50+, many of whom want the opportunity to consider and review their career options (work, learning, career development, job change, mixes of part-time working and voluntary work, and self-employment) in the context of advancing age. In the UK, Jobcentre Plus's objectives are targeted principally at disadvantaged adults who are unemployed, and especially on those without level 2 qualifications. As Jobcentre Plus is currently structured and resourced, the vast majority of older adults (whether employed, registered and 'hidden' unemployed, or 'inactive') are unlikely to receive the quality, depth and breadth of guidance service that many require in order to review the full range of options available to them and plan ahead, if "IAG" is only available to them from Jobcentre Plus. The extent to which government cuts in DWP staffing may affect front-line services is as yet unknown.
- 3.12 The current need is for effective local partnerships to be developed between guidance and learning providers, and for Jobcentre Plus to play a central and active role within those partnerships. The increasingly extensive range of initiatives that Jobcentre Plus is introducing to help older age groups, and especially the least qualified, shows that the 45/50+ could be among the main beneficiaries of such partnerships.

Pensions Service

- 3.13 The Pensions Service is potentially well placed to provide advice in suitable formats to older adults as they approach or reach retirement age. If the advice is to help older adults to remain active and participating members of local communities, it should contain information on continuing in work (part-time, full-time, self-employment), voluntary

¹⁰³ National Employment Panel (2004). *Welfare to Workforce Development*. Section II and throughout. London: NEP.

¹⁰⁴ Organisation for Economic Co-operation and Development (2004). *Career Guidance and Public Policy: Bridging the Gap*, pages 49-53. Paris: OECD.

¹⁰⁵ Department for Work and Pensions (2004). *Building on New Deal: Local Solutions Meeting Individual Needs*. Sheffield: DWP.

¹⁰⁶ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups. Annexes 1-7*. Sheffield: DfES.

¹⁰⁷ *Ibid.*

¹⁰⁸ Organisation for Economic Co-operation and Development (2004). *Career Guidance and Public Policy: Bridging the Gap*, page 60. Paris: OECD.

work, learning opportunities and work-life balance as well such areas as keeping healthy, security issues and locating sources of help on a range of issues, including financial ones.

- 3.14 In 2002 the Pensions Service published a useful, but expensively produced, national guide (also available on the web – see paragraph 3.3 (ix)), which contains information on these and other issues.¹⁰⁹ The need now is for local and less expensive guides to be produced that contain information relevant to the local community in which the recipients live, including local facilities and contacts, and can be distributed to everybody approaching or arriving at state pension age. Local guides could be produced using a national template so that essential national information (e.g. on the right to continue working) can be accurately reproduced. Organisations such as Age Concern and Help the Aged could be involved in the research and production, possibly using older volunteers to undertake some of the research (for which there are precedents).
- 3.15 The concept has been discussed at local level between some Jobcentre Plus and Pensions Service District Offices, as has the possibility of making individual pensions statements available to older adults aged 50+, including those who are unemployed, to help them appreciate the advisability of remaining in work.
- 3.16 At present a main barrier to implementation has been the availability of sufficient resources, including staffing. However, personalised local initiatives of this type are required if the UK is to encourage and enable older adults to remain active and contributing members of their local communities and the national economy (see paragraphs 5.35-5.37 which consider the proposed Third Age Service – Link-Age – following from the government’s manifesto commitment¹¹⁰).
- 3.17 The Government’s recently announced initiative to pilot Pensions Information Packs for employers and employees may also create an opportunity to provide older employees with information on work, learning and volunteering in addition to savings and pensions. However, the information on the pilot in the initial press release (5 July 2004) would suggest that these packs only contain information and advice on pensions¹¹¹. If this continues to be so, then it will be an opportunity missed to encourage and enable many more older adults to be productive, proactive and participating citizens. Continued government reference to older adults aged 60/65 solely as “pensioners”, and not simultaneously on the much greater utilisation of older people’s skills, experience and potential, tends to reinforce the concept of older adults as consumers of, rather than also being active contributors to, the gross national product.

State-funded guidance services

- 3.18 Although the four UK national skills strategies differ in their attention to demographic factors, and therefore in the emphasis they place on the proactive inclusion of older adults in lifelong learning strategies, the ‘home nations’ are in agreement that guidance provision is a central element in helping to raise the skills and educational levels of the workforce. A main objective of the English skills strategy is to “provide better information, advice and guidance on skills, training and qualifications, so that people know what is available, what the benefits are, and where to go”.¹¹² The Scottish strategy document specifies five “people-centred goals that will realise the vision for lifelong learning in Scotland”: these include “a Scotland where people are given the information, guidance and support they need to make effective learning decisions and transitions”¹¹³. The document makes clear that Careers Scotland is seen as a key partner in helping to realise the Scottish lifelong learning strategy. Careers Wales is one of four main economic agencies in Wales – the others are the National Council for Education and Learning in Wales (ELWa), the Welsh

Development Agency, and Jobcentre Plus – that are involved in a policy of practical cooperation to transform the Welsh economy.¹¹⁴

- 3.19 Subsequent government documents in Scotland, Wales and Northern Ireland, and the information that is available on the national career guidance websites (specifically Careers Scotland, Careers Wales and the Educational Guidance Service for Adults website in Northern Ireland – there is as yet no comparable national website for the public on adult guidance provision in England), refer explicitly to guidance provision as being all-age and therefore available without an upper age limit. In England the National Policy Framework and Action Plan for Information, Advice and Guidance for Adults states “The core IAG services will provide access to information and advice for all adults aged 20 and over, and with *no upper age limit*” (author’s italics).¹¹⁵ However, later documents have made clear that only ‘information’ will be free and that ‘advice’ (however defined) will be free only to adults who have not achieved level 2 qualifications.¹¹⁶
- 3.20 This section, which compares guidance provision in the four ‘home nations’, considers the statutory guidance provision for all age groups including young people, as well as identifying aspects and issues of specific relevance to older adults. This is deliberate. Third-age guidance in the statutory sector is only rarely a specialist area, and normally so only where a government agency has obtained short-term finance for a specific initiative targeted at helping older age groups and/or it is decided there is a local need to identify older adults as a priority group. Even in these cases, third-age guidance provision is dependent for its quality and existence on the overall structure and provision for guidance delivery to all adult age groups.
- 3.21 The guidance systems in each of the four ‘home nations’ differ considerably.
- Careers Scotland**
- 3.22 In Scotland, an all age-guidance career guidance service, Careers Scotland, was formed from a merger of 80 existing organisations including careers companies, adult guidance networks, education business partnerships and lifelong learning partnerships.¹¹⁷ Careers Scotland has a particular focus on supporting vulnerable young people but its services are aimed at all age groups, including those working in industry, as its well-designed and informative website makes clear. Careers Scotland has the status of a private enterprise, but funded by the Scottish Executive and answerable to the Minister for Enterprise, Transport and Lifelong Learning. It forms part of Scotland’s dual economic development agency structure consisting of Scottish Enterprise and Highlands and Islands Enterprise. Its focus on tackling social exclusion is therefore integrated into the Scottish skills agenda, within which it represents an important force, linking national, economic, social, labour market, learning and related initiatives to the needs of individuals regardless of age.
- 3.23 Adult guidance services which Careers Scotland is offering to adults, and which are of particular value to older adults, include:
- Easy access to all guidance services through the national Careers Scotland website.
 - Independent and impartial career guidance by trained and experienced practitioners on: career planning; changing jobs; education and training; retirement planning; and voluntary work.

¹⁰⁹ The Pensions Service (October 2002). *Pensioners’ Guide – England and Wales*. Sheffield: DWP: the Pensions Service.

¹¹⁰ Labour Party Manifesto, 2001. The reference to an ‘integrated third age service’ is contained in a section on ‘Pensions and Pensioners’, page 28.

¹¹¹ Department for Work and Pensions (5 July 2004). Press Release: “Andrew Smith launches Pensions Information Pack pilot”. www.dwp.gov.uk

¹¹² Department for Education and Skills (2003). *21st Century Skills, Realising Our Potential*, page 24. Sheffield: DFES.

¹¹³ Scottish Executive (2003). *Life Through Learning, Learning Through Life: the Lifelong Learning Strategy for Scotland*, page 7. Edinburgh: Scottish Executive.

¹¹⁴ National Assembly for Wales (2002). *Skills and Employment Action Plan for Wales 2002*. Cardiff: National Assembly for Wales.

¹¹⁵ Department for Education and Skills (2004). *Information, Advice and Guidance for Adults: the National Policy Framework and Action Plan*. Sheffield: DFES.

¹¹⁶ Learning and Skills Council (2004). *Coherent Information, Advice and Guidance (IAG) Services for Adults*. Coventry: LSC.

¹¹⁷ Institute of Career Guidance (2002). *Career Guidance: One Aim, Three Routes*. ICG Briefing Paper. Stourbridge: ICG.

- An increasingly extensive supply of labour market intelligence readily accessible on the Careers Scotland website. Information is provided on: the skills, qualifications and qualities demanded by different jobs; training and education opportunities (although, given the importance of web-based guidance facilities to the many remote communities in Scotland, the portal link with Learndirect Scotland's national database of learning opportunities could be more explicitly signposted on the Careers Scotland website); local, regional and national labour market information, including trends and changes; skills transfer between industrial sectors; local employment, learning and other networks; and signposting to other helping agencies.
- Practical assistance in applying for work that include help and support in: analysis of experience and skills; CV preparation; completing application forms; interview techniques; and job-search.

3.24 The all-age framework created by Careers Scotland is impressive and offers much of the structure necessary for comprehensive adult career guidance provision. However, in practice Careers Scotland has encountered difficulty in fully implementing its guidance provision for adults, for reasons that include resource difficulties and the shortage of professionally trained careers advisers. This means, for example, that Careers Scotland's local offices have been reluctant to market the personalised provision as extensively as management and staff would like. Adult guidance provision is also patchy and difficulties have been encountered in sustaining some local adult guidance networks. This can affect services appropriate to the 45+.

Careers Wales, GyrfaCymru

- 3.25 Careers Wales is an all-age guidance service launched in April 2001, and operating currently through seven companies (shortly to be merged into five companies) and 70 centres covering all regions of Wales.¹¹⁸ Careers Wales is funded under contract by the National Assembly for Wales and is answerable to the Minister for Training and Education. Careers Wales Association Limited is central to the Welsh system of career guidance, and provides support and services to all the companies as well as being responsible for the national website and on-line developments. A recent review and evaluation of Careers Wales¹¹⁹ was generally positive in terms of regional companies' performance and partnerships with local provider agencies, but considered that improvements could be made in terms of partner organisations relating to Careers Wales as a national body. In Wales, unlike England and Scotland, the learndirect helpline service is provided by Careers Wales.
- 3.26 The Careers Wales Review observes that adult guidance is one of Careers Wales' fastest-growing services. Guidance services are offered to adults who are: in work; unemployed; returning to work; being made redundant; leaving full-time education; looking for a career change; and considering a return to education and training. Guidance activities and services include: a CV advice service; individual career guidance interviews; psychometric and personality testing; an information service providing access to comprehensive all-age careers libraries including adult reference books and computer software packages; and help in choosing personally suitable education, training and employment opportunities. However, some of the services (for example, one-to-one guidance and psychometric testing) may be chargeable to more qualified individuals. Careers Wales' adult priority groups are the less qualified, and especially those with basic skills needs, and who have not achieved level 2 qualifications, to whom all services are provided free. Companies have local flexibility to identify other adult groups with particular needs, and this could provide an avenue for companies to target specific groups of older adults.

3.27 Careers Wales provides an extensive range of guidance services for local industry. Services which are of potential relevance to older workers include: guidance activities for individuals affected by redundancy; training needs analyses; individual career development interviews for staff including, where appropriate, use of psychometric instruments; and advice on job design and person specifications including information and advice on lifelong learning. Some services for employers and individuals may be chargeable.

3.28 In common with guidance providers in all the 'home nations', Careers Wales has found there is a potentially huge demand from adults for guidance services, and is having to ration the more resource intensive services (e.g. personal interviews) because of the inability of staff to meet public demand. This means: strengthening partnerships with other local helping agencies (the Careers Companies provide the central and specialist career guidance 'hub'); extending and developing on-line guidance (information, advice) services via the web; and training more front-line staff in careers centres to deal with initial enquiries and to signpost clients appropriately for career guidance or other help and support.

Northern Ireland

- 3.29 In Northern Ireland the national Careers Service, which is all-age, is the responsibility of the Department for Employment and Learning's Employment Service.
- 3.30 Educational guidance is the responsibility of the Educational Guidance Service for Adults (EGSA), a well-established national service which largely pioneered the provision of community-based and educationally-oriented adult guidance in the UK on a national scale, and is widely recognised as an international model of excellence. EGSA's objective is to work in partnership with other agencies in order to create a culture in Northern Ireland where "all learning is valued and is accessible to all".¹²⁰ EGSA provides guidance services for adult learners, providers, employers and other interested parties from eight local offices across Northern Ireland with headquarters in Belfast. It provides support facilities to other agencies offering guidance services (including community organisations and employers) and has designed training packages to train frontline staff in appropriate guidance techniques. EGSA is responsible for the learndirect helpline in Northern Ireland, working in partnership with Broadcasting Support Services. It provides an Essential Skills referral and support service for adults wanting to improve their reading, writing and arithmetical skills and funds Essential Skills learning initiatives through its involvement in the Intermediary Funding Body (IFB) role in the Peace 11 element of the Special European Union Programmes Body. In addition, EGSA organises and supports campaigns and events to promote adult learning, undertakes and commissions research and advises on public policy, and prepares guidance resources – for example, information sheets on adult learning provision at all levels and for a range of target and priority groups.
- 3.31 The EGSA website provides a link to an online service targeted specifically at older people – the Golden Surfers website. This is a new service for older people and offers information on local events as well as enabling older adults to engage in online conversations and dialogue on joint concerns and issues.
- 3.32 During the period 2004-07 the DEL is planning to introduce a new technology-aided Careers Service to enable "clients of all ages to make informed, realistic and sound career decisions".¹²¹ It also intends to use internet technology to ensure that the new Careers Service, the Employment Service's adult personal adviser service, EGSA and the learndirect learning database and helpline service provide coherent guidance services, and that the public are able to select the correct source of guidance and support by using a new careers website which is being introduced. Face-to-face support is to be provided for

¹¹⁸ Institute of Career Guidance (2002). *Career Guidance: One Aim, Three Routes: An ICG Briefing Paper*. Stourbridge: ICG.

¹¹⁹ Moulson, R. & Prail, S. (2004). *Careers Wales Review – Final Report*. Cardiff: Welsh Assembly Government.

¹²⁰ EGSA website : 'About us': www.egsa.org.uk

¹²¹ Department for Employment and Learning (2004). *Strategic Plan 2004-2007*, page 20. Belfast: DELNI.

“those who most need it”, with technology to be used to facilitate self-help where this is appropriate.¹²² The objectives include: helping economic and social development through improved guidance delivery and public access to guidance services; ensuring that people are aware of the options available to them; helping them to choose those options that best meet their needs; and improving levels of retention and attainment in training programmes and further and higher education courses.

- 3.33 The aim in Northern Ireland is to ensure that people have easy access to information on the full range options available, and to guidance services that can help them relate the options to their own situations and requirements – including career and personal development in the widest sense. The emphasis on all-age provision should mean that older adults have full access to these services and are positively welcomed. The involvement of the highly experienced EGSA should ensure that third-age guidance helps older adults to make often difficult personal decisions about work (full-time, part-time, self-employed, voluntary), learning and lifestyle, and the various combinations that are possible, according to individual circumstance and location.

England

A service divided according to age

- 3.34 England, alone among the ‘home nations’, opted in 2000 to divide its Careers Service, previously operated through local careers companies, into two services – Connexions for young people aged 13-19 and Information, Advice and Guidance (IAG) Partnerships from 20+. The division has very considerable implications for the quality of career guidance currently available to the present generation of older adults, and for the generations that will follow.
- 3.35 The Connexions Service, which is the responsibility of DfES and has been developed largely from the Careers Service budget, has prioritised the needs of young people not in employment, education or training (the so-called NEET group) and has done this by training its staff, including the professionally trained and qualified career guidance specialists, as generic personal advisers with skills in a wide range of social care issues. Those staff who are trained specifically in career guidance are not allowed to use the term ‘career’; their specialisation is hidden behind the title ‘personal adviser’. This means that young people and parents wanting specialist careers advice do not know whether the personal advisers concerned have been specially trained to help them. Concern about this issue, and more especially the withdrawal of much of the previously widely available and professionally-delivered career guidance from the majority of young people, including the 50% who are expected to enter higher education, has mounted. School, college and higher education management and staff, parents, politicians, employer organisations and other interested parties, are among those who see many young people in England as ill-prepared to make informed career choices which relate their own skills and abilities to opportunities in work and lifelong learning, and to identify clearly the career implications of educational (including further and higher educational) choice.
- 3.36 Concern has intensified in recent months because the *Every Child Matters* Green Paper, which has shaped the Children’s Bill, proposes that Connexions should be subsumed within the new Children’s Trusts, and become part of local authorities. Professor Tony Watts, a member of the OECD Career Guidance Policy Review project team, has pointed out that “this offers the prospect of careers services being even further marginalised. The age-frame of the trusts will be 0-19, not 14-19; the main focus will be child protection, not development; the key players will be social services, not education. Ring-fencing of budgets will be difficult to sustain. If career guidance advocates have struggled to have their voice heard within Connexions, this will now be even more the case, with power struggles being played out between much larger forces”¹²³. Schools and colleges have no

financial allocation to make up the shortfall; and in England, as in the rest of the UK and elsewhere in Europe and the developed world, guidance has proved most effective where there is a close working partnership between schools, colleges and externally-based and professionally-trained career guidance staff who can relate learning to the world of work.¹²⁴

- 3.37 The erosion of careers education and guidance in England for the majority of young people aged 13-19 has prompted a government enquiry – the DfES ‘end-to-end’ review of careers education and guidance.
- 3.38 Consideration of career guidance provision for young people aged 13-19 may seem far removed from a paper on third-age guidance and learning. In fact it is fundamental. The powerhouse that drives many career guidance services in the UK and elsewhere is the work first developed with young people. If this is removed, much of the services’ energy, motivation, experience and initial source of expertise simultaneously evaporates. The present disenchantment and gradual haemorrhage of experienced career guidance staff from the currently divided and fragmented potpourri of provision, represent one critically important manifestation of the loss of morale affecting large swathes of career guidance practice in England. One major consequence is that these highly-skilled and experienced staff are no longer available to work with older age groups.
- 3.39 In contrast to the divided and diluted career guidance provision in England, all-age guidance services offers considerable advantages for older age groups – for those already aged 45+, for future generations of older adults, and for the staff who work with them. For example:
- (i) *Unnecessary duplication of career information and guidance resources can be avoided* by ensuring that the resources are housed in resource centres open to all age groups. Although some material is clearly for specific age groups, much is essentially all-age. Many of the resources, which may first developed for young people, are subsequently adaptable for adult usage. Examples include: occupational and labour market information; information on learning providers; learning opportunities (many common to all ages); and computer-assisted guidance programmes such as those that help adults to analyse their skills and interests and relate these to occupational areas.
 - (ii) *Use of premises can be optimised.* The division between 13-19 and adult guidance can lead to the inefficient use of premises, and especially so in career centres (or equivalent) offering services to both age groups but where the public and staff both perceive the 13-19 age range as the priority group. Many older people are nervous about approaching public offices and strong shop-front marketing of the Connexions logo may make older adults feel unwelcome.

The problem could be intensified in offices offering services to both young people and adults but where the staff are subject to different employers and objectives. This would occur where Connexions staff are employed by local authorities as part of Children’s Trusts, and adult guidance staff are employed by a different organisation holding the IAG Partnership contract from the LSC. To date, a number of careers centres (or equivalent) have combined Connexions services for young people with IAG services to adults. Some centres have also offered adult learning through learndirect and/or as an accessible high-street-situated outpost of the local FE college. These centres have proved popular with older adults: during the Challenging Age research, one all-age careers centre found that 50% of its client group were aged 45+. Feedback from other services shows that this

¹²² *Ibid*, page 21.

¹²³ Watts, A.G. (2004). Model guidance system. *Times Educational Supplement*, 14 November.

¹²⁴ Sultana, R.G. (2004). *Guidance Policies in the Knowledge Society: Trends, Challenges and Responses across Europe*. CEDEFOP Panorama Series No. 85. Luxembourg: Office for Official Publications of the European Communities

experience is far from unique. However, in at least one area of high unemployment the Connexions Service (which also held the IAG Partnership contract) has cut back its successful learning and guidance centre for adults, well used by many 45+, in order to provide space for the Connexions Service HQ.

- (iii) Information and experience from working with older adults can be used by guidance staff to *inform career guidance for younger age groups*, for example, through reinforcement of the importance of: learning throughout life¹²⁵; gaining qualifications; career management skills; and becoming financially literate – including developing a practical understanding of the need to save for retirement and how to do so (understandably not seen as a priority by many young people, but needing to become so to prevent future generations falling into poverty in later life).
- (iv) Partnerships can be formed, and career and learning outreach projects implemented, that *reach out to all-age groups within local communities*, or are targeted at specific groups, according to local need.
- (v) Older adults may identify *gaps in local community provision* for younger age groups. This is particularly so where whole families are involved. At least one successful community learning and mentoring project started by older adults to support young people is known to have started from shared experience of guidance and learning. There are undoubtedly others.
- (vi) *Work with employers* – services to promote learning, provide career guidance support for individual workers, assist employers on training and recruitment requirements, or identify opportunities for work experience (older adults often want work experience too), can be undertaken by staff from the same organisation. This minimises the risk that employers will be approached by different statutory organisations with similar objectives, leading to employer confusion and disenchantment.
- (vii) *E-guidance facilities* can be created appropriate for all age groups, and with a common entry point – for example, through well-designed websites such those of Careers Scotland and EGSA (Northern Ireland) which provide information for older adults.
- (viii) *Guidance workers* have more opportunities to broaden their expertise, to the benefit of the wider public. Career prospects for guidance workers may also be improved, and the consequent improvement in morale and experience can have positive consequences for the quality of service received by the public.
- (ix) Most important, *all-age services reinforce the lifelong learning implications of the national skills agenda* so that people of all ages can be equipped for flexible and rapidly changing labour markets, and provide the local public with guidance throughout life.

3.40 Ronald Sultana, in the CEDEFOP review of career guidance in EU countries, observes that: “notions of lifelong engagement in education and training as well as lifelong careers (rather than lifelong jobs) logically require forms of guidance services that accompany all citizens throughout life, to be drawn upon when required, depending on the information and advice needs of the user, and the opportunities in the employment and training market. It has been argued that the skills required to manage a ‘life career’ in a learning society, as well as the personal stance that needs to be adopted, should be inculcated early on in

schooling”¹²⁶. Sultana then identifies a number of the necessary skills, including the ability to learn how to learn, identify personal learning needs and manage and take control of one’s own learning. “The image is that persons who take control of their own learning, are knowledgeable about the resources around them, and know where to get information and advice to transform service offers into opportunities that further their life goals. *Such skills are invaluable for managing careers in later life*” (my italics)¹²⁷.

3.41 Sultana also observes that an OECD study suggests that less than half of earnings variation in OECD countries can be accounted for by educational qualifications and readily measurable skills; and that a significant part of the remainder might be explained by people’s ability to build and manage their skills, including career planning, job-search and other career-management skills¹²⁸. This observation has enormous implications for career guidance provision for those who are already 45+, for future generations of older adults, and ultimately for the whole economy.

Information, Advice and Guidance Partnerships

3.42 In 1999, Information, Advice and Guidance (IAG) Partnerships were introduced in England to provide IAG services to adults. The IAG Partnerships are administered by the LSC and overall policy is the responsibility of DfES. Local responsibility for running the IAG Partnerships is contracted out via tender and to date the majority of the successful contractors have also had responsibility for Connexions.

3.43 The IAG Partnerships were principally conceived to bring together the full range of provider organisations offering guidance services – or elements of guidance – within local areas, including the previous careers companies, colleges and universities, voluntary and community organisations, employers and trade unions. The main contracting organisation normally provides the central hub of each partnership and is responsible – in collaboration with the LSC – for such activities as: recruitment of agencies to the partnership; quality assurance and development; organising training and related partnership events; disseminating information; determining priorities, including the allocation of funding to specific providers to target particular local adult priority groups; identifying gaps in local learning and related provision; feedback of key information to the responsible LLSC; and overall administration.

3.44 Contracting organisations throughout England have differed considerably in the extent to which they have delivered IAG services directly to the public themselves or have passed out the responsibility to key partner agencies.

3.45 The services expected from ‘information’, ‘advice’ and ‘guidance’ are tightly defined. Publicly-funded provision has been earmarked for the cheaper guidance activities of ‘information’ and ‘advice’, except in those instances where public finance is allocated for specifically targeted initiatives: for example, to pilot ‘enhanced services’ for specific groups or to extend guidance activities to industry (especially SMEs) in order to encourage greater employer attention to training (especially in basic skills), and the encouragement of company learning cultures.

3.46 Some ‘enhanced services’ initiatives are impressive and highly innovative. Examples include a number of the employer-focused guidance projects piloted through the LSC Quality Development Fund¹²⁹, and the Skills and Guidance for Employees (SAGE) initiative in South Yorkshire and Sheffield trialled as part of the DfES Guidance Pilots¹³⁰. IAG Partnerships in areas with Employee Training Pilots have worked closely with the other key partners to provide ‘enhanced services’ for employees interested in learning

¹²⁶ Sultana R.G. (2004). *Guidance Policies in the Knowledge Society. Trends, Challenges and Responses across Europe*, page 42. CEDEFOP Panorama Series No 85. Luxembourg: Office for Official Publications of the European Communities.

¹²⁷ *Ibid.*, pages 42-43.

¹²⁸ Organisation for Economic Co-operation and Development (2002). *Rethinking human capital*. In *Education Policy Analysis*. Paris: OECD.

¹²⁹ Learning and Skills Council (2003). *Developing Local Information Advice and Guidance Services: a Report on Local Quality Development Fund Projects 2002/2003*. Coventry: LSC.

¹³⁰ Lifetime, South Yorkshire and Sheffield Futures (2003). *Skills and Guidance for Employees: Action Research: the Evidence*. Doncaster: Lifetime Careers (BDR) Ltd.

opportunities, and especially in basic skills. Considerable numbers of older employees have benefited from these targeted initiatives.

3.47 However, feedback indicates that key policy-makers at senior level in government remain unconvinced by the evidence. Factors appear to include the perceived additional cost of 'guidance', the difficulty in short-term (one-year) projects of gathering information on the longer-term benefits of guidance, and a continuing lack of understanding that career guidance consists of a range of inter-related activities designed to help people make well-informed and well-considered decisions on learning and work, and should not be defined purely as an interview of an hour or more duration (paragraph 2.6).

3.48 In December 2003, and following recommendations in the Government's Skills Strategy¹³¹ about the importance of information, advice and guidance in helping to carry through the Strategy, the DfES published its National Policy Framework and Action Plan for IAG for adults.¹³² Subsequent documents have since clarified the fine detail of the Plan^{133 134}. Key elements of relevance to third-age guidance provision include the following:

- (i) *A core entitlement* for access to 'information services' for all adults aged 20+. The information entitlement list is detailed and comprehensive and includes accessible labour market information.
- (ii) *Free 'advice services' for adults who have not achieved Level 2 qualifications.* Local LSCs may have some discretion to offer 'advice services' to certain local priority groups of adults up to Level 3 where there are particular local skill requirements, but this is still subject to discussion. 'Enhanced services' (the term 'guidance' has all but disappeared from later documents) may be offered to certain priority groups through specific targeted initiatives and subject to LSC approval. Adults above Level 2 who require 'guidance' will be expected to look elsewhere. The Minister's Foreword to the IAG Framework and Policy document states that: "there are many career consultancy firms providing guidance commercially, and we welcome the work of the private sector to make available IAG services for those people who can afford to pay for them. The Government's efforts and investment of public funds should focus on those who need the most help, and who are least able to pay for it."¹³⁵
- (iii) *A 'national entry point' to IAG services via the learndirect helpline and website* which will direct users to other services as appropriate and in accordance with their needs. There will be 'no wrong door' for users who want to access IAG.
- (iv) *Emphasis on the quality of IAG provision and on the personal qualities and skills of the staff delivering IAG.* The conditions that IAG providers need to meet, for example in terms of accessibility and standards of public service, are precisely set out. All front-line staff will be expected to be working towards appropriate qualifications in IAG to Level 3 standard, but only to Level 4 if they are likely to be involved in providing 'enhanced services'. This is a significant departure from previous practice where guidance practitioners were expected to hold or be working towards Level 4, and is further confirmation of government's unwillingness to fund 'guidance' (however defined).
- (v) *Restriction of the funding available for IAG delivered directly to the public by the main contractor to a maximum of 40% of the total finance allocated for direct IAG delivery.* At least 60% of the finance must be allocated to other providers. A

main objective is to reinforce government's determination to reach out to the more disadvantaged members of local communities.

- (vi) *Strengthening of partnerships with key stakeholders*, and most notably with Jobcentre Plus, to ensure coherent strategies to reach out to local communities and promote the advantages of 'IAG' and learning, including their relationship to work.
- (vii) Creation of a *National Resource Centre*, managed by the LSC through learndirect, which will collect and store information on high-quality career resource materials, ensure that the information is widely available to the public and providers, and identify gaps where resources need to be developed and commissioned.
- (viii) The appointment of *local IAG Boards* responsible for overseeing the new partnerships, chaired by the LSC, and with members appointed from senior representatives of Connexions, Jobcentre Plus, Business Link, and such bodies as employers, trade unions, further and higher education, and the voluntary sector.

3.49 Responsibility for managing the 47 new IAG Partnerships in each local area has been open to tender and the LSC announced the results in August 2004. Many of the successful contractors are Connexions partnerships but others are private companies, and one is a County Council. The contracts are initially for a 12-month period.

3.50 The new IAG services have a number of features that could prove particularly helpful for older age groups. For example:

- (i) The implementation of a policy of '*no wrong door*' access to IAG through close ICT-assisted collaboration between the learndirect national helpline and IAG Partnerships, could help many older adults to identify suitable sources of information and advice, and makes it possible for IAG providers to specifically target the 45+ and ensure they are welcomed. The Challenging Age research¹³⁶ shows that many older adults do not know how to access 'IAG' services, nor are they familiar with the term. Many of those interviewed who had received guidance had learned about their own helping agency through chance encounters – for example, through spotting information in a public library, hearing a publicity item on local radio, referral from another helping agency such as a CAB, or via the local grapevine of friends and neighbours. Most had approached their 'IAG' provider with some trepidation, feeling that providers are mainly interested in younger age groups. Feedback from front-line providers confirms that many older adults who want help in identifying suitable work and learning, and in relating opportunities to their own needs, have no idea where to turn for assistance and support.
- (ii) *Ufi/learndirect* aims to develop a comprehensive national database of local learning opportunities and will be working closely with LLSCs, IAG Partnerships and local providers to achieve this. Feedback from guidance providers shows that *older adults frequently look for learning opportunities in their immediate community* and are less prepared to travel in order to learn.¹³⁷ For many older adults, the opportunity to learn with friends may be a more important influence in their choice of learning than the actual subject chosen. Ufi/learndirect is taking these factors on board in its aim for comprehensiveness. This is in the immediate interests of older learners.

¹³¹ Department for Education and Skills (2003). *21st Century Skills, Realising Our Potential*, page 24. Sheffield: DfES.

¹³² Department for Education and Skills (2003). *Information, Advice and Guidance for Adults: the National Policy Framework and Action Plan*. London: DfES.

¹³³ Learning and Skills Council (2004). *Coherent Information, Advice and Guidance (IAG) Services for Adults*. Coventry: LSC.

¹³⁴ Learning and Skills Council (2004). *Invitation to Tender to Procure and Manage Information and Advice Services for Adults in Local Learning and Skills Council Areas*. Coventry: LSC.

¹³⁵ Department for Education and Skills (2003). *Information, Advice and Guidance for Adults: the National Policy Framework and Action Plan*, Foreword. London: DfES.

¹³⁶ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups. Report and Annexes 1-7*. Sheffield: DfES.

¹³⁷ Ford, G. & Soulsby, J. (2000). *Northamptonshire Third Age Employment and Learning Project: Recommendations to Develop Services and Arrangements to Help Older People Maximise their Employability and Potential for Personal Growth in Northamptonshire*. Leicester: NIACE. The findings of this report have been confirmed by the Challenging Age Research Report, and subsequent consultancy as well as soft feedback from, and the joint experience of, many front-line adult educationalists.

- (iii) *Concentration of funding on adults who have not attained Level 2 qualifications* benefits more adults aged 40+ than any other age group¹³⁸. Many older adults have high levels of skill and experience but do not have the qualifications to support these. This can create difficulties if they are made redundant and apply for other jobs.¹³⁹
- (iv) Although there may be doubts about the chosen methodology, government concern that there should be a number of sources of guidance provision in each area reinforces the *importance of outreach* in work with older age groups. A fundamental task of third-age guidance providers is to change individual and community attitudes and to help older adults to appreciate that are not too old to learn and work (both paid work and also in the wider sense of service to the local community). Therefore reaching out to older adults through a variety of strategies and initiatives is essential if third-age guidance is to be truly effective.
- (v) The *National Resource Centre* is a most welcome development. It can provide an important mechanism for the dissemination of resources to assist older adults to make informed decisions and provide support for those helping them. For example, information briefings and other resources prepared by such organisations as Age Concern, the DWP Age Positive team, the Employers Forum on Age, the Health Development Agency, Help the Aged, the NIACE Older and Bolder project, and the Third Age Employment Network (TAEN), can be made more widely accessible and utilised. The National Resource Centre can help to identify main gaps in existing provision: for example, many older adults want local labour market information that takes account of developments affecting all age groups (not only young people), and guidance tools that enable them to assess their personal values (values can change considerably as people age) and relate these more closely to opportunities in work and learning. It is hoped that the National Resource Base will become a UK-wide service so that resources developed in all the 'home nations' can be made available and disseminated.
- (vi) The formation of the *local IAG Boards* in each area, chaired by the local LSC and with direct routes both to national (through the LSC) and regional policy makers (for example, through the Regional Skills Councils), provides an important and potentially powerful communication structure through which the guidance and learning requirements of older adults can be regularly considered and recommendations conveyed to the appropriate policy-makers at each level.

3.51 However, there are also a number of important features of the reorganised IAG provision, which (unless adjusted) could impede access by older adults to often much-needed information, advice and guidance. These features include the following:

- (i) The future success of the IAG strategy in England (and also in Scotland, Wales and Northern Ireland) depends considerably on *individual IT skills and access to the internet*. NIACE's research over twenty years has drawn attention to the continuing learning divide between the 'educationally privileged' and the 'learning poor', 'a divide exacerbated by a more recent digital divide'.¹⁴⁰ Although many older adults are computer literate and more are becoming so (the so-called 'silver surfers'), there remain many who are not in this position and do not have easy access to a computer and the internet. The preparedness of these groups to use the learndirect telephone helpline may also prove all-important. There may be a need for specific targeting to ensure that excluded groups, irrespective of age, understand that learndirect is also there to help them and welcomes their calls.

¹³⁸ House of Lords (2004). *House of Lords Select Committee on Economic Affairs: 2nd report of Session 2003-04: Government Response to Aspects of the Economics of an Ageing Population: Report*. London: The Stationery Office.

¹³⁹ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups. Report and Annexes 1-7*. Sheffield: DFES.

¹⁴⁰ NIACE (2004). *Lifelong Learning and the Spending Review*. Leicester: NIACE.

- (ii) The stipulation that *access to free 'advice and guidance' is restricted to adults with qualifications below level 2* has been the subject of considerable criticism by frontline guidance workers, managers and others working in the guidance field. Many older adults are severely disadvantaged on age grounds alone. This applies both to employed and unemployed older adults. Many unemployed 45/50+ encounter difficulties in obtaining suitable alternative employment. Many older employees experience the stereotypical attitudes of workplace colleagues and managers, and may not be encouraged to attend training programmes or apply for promotion.

Whether employed or unemployed, many older adults experience varying degrees of exclusion and need skilled help to become re-included in work and the community. Continued exclusion can lead to isolation, which in its turn leads to loss of self-esteem. Low levels of self-esteem reinforce the problem by eroding employability, and deny the economy the opportunity to re-harness third-age skills, abilities and experience. This happens irrespective of qualification level. The need is to help older adults before the problems become ingrained and they withdraw from the labour market. Entitlements that are strictly interpreted according to qualification levels and not individual need, impose additional barriers that block the inclusion and reintegration into work and community of many 45/50+.

Strict interpretation of '*below level 2' eligibility for advice and guidance* could also lead to unintended inconsistencies. For example, significant numbers of business owners are older adults who have succeeded without qualifications. Under current conditions, they would be entitled to free advice and guidance leading to accreditation at level 2. Correspondingly, an older adult with a disability who has achieved a level 2 qualification over the years through sheer persistence may be debarred. For older adults, discrimination on the basis of qualification alone, rather than according to a wider interpretation of individual need, represents a highly imprecise instrument.

- (iii) The extent to which "there are many private career consultancy companies providing guidance commercially"¹⁴¹ requires more detailed study. No mapping of the coverage and location of *private guidance providers* has yet been undertaken. Soft feedback suggests there are areas of the country, and particularly so in areas of higher unemployment such as the North East, where provision appears sparse and in some areas virtually non-existent. Previous experiments in the UK and other countries indicate that many people are unwilling to pay for guidance. Causes for market failure are complex but appear to relate to such factors as inability to pay (unemployment causes poverty irrespective of qualification level), lack of understanding of 'guidance', and not knowing what to expect.

At least one company which has been awarded an IAG Partnership contract, and is operating in an area with higher than average numbers of older adults, is known to be exploring the possibility of re-introducing charges for guidance, with the elements of the guidance process carefully sub-divided and each allocated a separate charge. The extent to which adults of all ages may now be prepared to pay for career guidance requires careful evaluation. On previous evidence, it is doubtful whether a policy of charging individuals for guidance services will enable the UK to deal with the over-riding third-age issue, i.e. ensuring that the skills, experience and potential of older adults are much more effectively utilised, and that the national economy and local communities benefit accordingly.

- (iv) Without careful staff and resource management, *the current restructuring of IAG could cause a break in continuity of provision affecting significant numbers of older adults*. Examples where dislocation could occur include:

¹⁴¹ Department for Education and Skills (2003). *Information, Advice and Guidance for Adults: the National Policy Framework and Action Plan*. Foreword. London: DFES.

- Provision by some IAG Partnerships of *special initiatives to assist and support older adults*. Targeted third-age guidance initiatives administered by IAG Partnerships, and focused mainly on outreach to older age groups, have increased in number during the past two years – at least partly in response to the findings of the DfES Challenging Age research report¹⁴². Change of management may threaten continuity. In addition, the ‘below level 2’ stipulation could mean that many older adults may now be ineligible because they are assessed as having achieved level 2 qualifications.
 - Many guidance managers and workers are concerned about marketing guidance outreach projects to communities, and then having to separate individuals into those who have not achieved level 2 (and are therefore entitled to the full programme) and those who have level 2 qualifications and are therefore debarred from advice and guidance, even though they have the same needs. For many adults the term ‘level 2’ means little, and experience shows that many older adults have difficulty remembering their qualification levels including grades in earlier GCE and CSE examinations.
 - *Continuity of guidance work with local employers*, including projects that originated as part of the Quality Development Fund and Guidance Pilots. These initiatives are not age-related and feedback indicates that considerable numbers of 45+ have benefited, whether they have below or above level 2 qualifications. The projects have also encouraged many employers, and especially SMEs, to understand the importance of introducing comprehensive company training strategies. Guidance support provided within the Employee Development Pilots may be less affected, because these have been targeted from the start on employees without vocational or basic skills qualifications at level 2.
- (v) Connexions Services are expected to have mechanisms that enable them to consult closely with young people. Representatives of the 13-19 priority groups were also consulted in the planning stages of Connexions. In contrast, *adults have not systematically been consulted in the formation of the IAG Partnerships*. The Challenging Age research project has demonstrated the *value of consulting older adults* about their guidance and learning requirements, evaluating local provision in the light of the feedback, identifying strengths and gaps, and (as far as possible) planning and adjusting provision in order to respond to their needs.
- (vi) *The constraint imposed on central contracting organisations to limit expenditure on their own direct delivery to 40% of the total direct delivery budget*, helps to ensure a greater diversity of IAG provision, and may strengthen outreach to specific target groups, although this is arguable. Many centrally-based services have also proved extremely successful at reaching out to communities and priority groups, using a wide range of locations and approaches.

However, the constraints on central delivery mean that it is now *more difficult to provide a central source of expertise and good professional practice at the heart of local partnerships*. Regular change and constant insecurity have prompted a loss of highly trained and skilled staff from career guidance, and a closure of full-time courses because of the apparent moves in England to ‘de-professionalise’ career guidance so that it no longer exists as a distinct activity or profession but is integrated into other services such as teaching and ‘personal adviser’ work. Highly skilled and experienced staff have been lost as a consequence and morale is generally low throughout the statutory guidance services, to the ultimate detriment of the quality of service experienced by the public, including older age groups.

3.52 The fragmentary approach apparent in England contrasts starkly with practice in Scotland and Wales, and increasingly so in Northern Ireland. In each country the national, and

centrally co-ordinated, professional career guidance service is entrusted to provide the necessary dynamism, expertise and social and economic purpose to drive local partnerships and networks.

- 3.53 Chris Humphries, Director General of the City & Guilds of London Institute, has provided an acute analysis of the role of guidance in relation to skills, work, lifelong learning and related factors including the changing demographics¹⁴³. Humphries has identified a number of ‘main capabilities’ of efficient adult guidance services, including:
- (i) Staff sensitivity towards the needs of reluctant learners and the skills to encourage them to participate.
 - (ii) Communication structures and networks that can make local labour markets publicly accessible and comprehensible.
 - (iii) The ability to help individuals by: analysing their skills and prior experience (as distinct from qualifications); identifying their learning requirements; assessing the personal returns; relating these to personal circumstances; and planning accordingly.
 - (iv) Detailed knowledge of local learning opportunities, so that advisers can direct adults towards provision that meets their personal skills and interests, including preferred learning style/s.
 - (v) Helping adults to enhance their understanding of career planning and management, and therefore develop greater self-sufficiency in managing their own careers.
 - (vi) Making appropriate advice and support available to SMEs, which may include: providing coaching and support for managers in the basic principles of company training plans and training needs analysis; assessing future training requirements; identifying suitable local learning provision; designing customised learning programmes for individuals; and providing in-company mentoring and coaching.
- 3.54 Humphries advocates a single point of contact for adults and other key customers including employers, and the adoption of an “integrated ‘account manager’ approach which guarantees ‘joined up’ service and reduces the risk of initiative or contact fatigue”¹⁴⁴. Humphries questions whether fragmented services dependent on partnership provision, however ‘joined up’ they may be, can “provide the same quality, coherent and focused service to small firms and adult learners that should be the offer from a single professional and local organisation”¹⁴⁵. He asks “Why, if the horizontal integration of youth provision in the English Connexions service is so logical, have Wales and Scotland consciously rejected this approach in favour of a vertically integrated ‘all-age’ guidance service? There are clear concerns being raised in many parts of England about the loss of coherence of guidance provision, and claims of a significant reduction in service to the majority of able young people as well as parents.”¹⁴⁶
- 3.55 Comparisons between the guidance systems in the four ‘home countries’, combined with international evidence of the growing attention to the centrality of efficient guidance systems within national economic strategies in the developed and developing world, confirms the reality of Humphries’ concerns. Scotland, Wales and Northern Ireland are building on the previous foundations and (subject to the inevitable resource constraints) have simply got on with it. In contrast, England has talked, prevaricated, and restructured,

¹⁴³ Humphries, C. (2002). *Skills, Work and Lifelong Learning: the Role of Guidance*. Derby: Centre for Guidance Studies, University of Derby.

¹⁴⁴ *Ibid*, page 9.

¹⁴⁵ *Ibid*, page 9.

¹⁴⁶ *Ibid*, page 9.

undecided whether it believes in the value of guidance (or what the term means) and therefore whether or not it wants a properly structured guidance service. Older adults are among the many who have lost out.

- 3.56 It is possible that the new arrangements may improve the quality and delivery of guidance in England. The greater prominence given to the role of learndirect as a 'single point of entry' is a move in the right direction. So also is the area coordination role granted to the local LSC-chaired IAG Area Boards. However, there are no guarantees. Frequent change, and an apparent desire by Government to dig up the foundations and start again, have destroyed staff morale in the process. This in its turn has rebounded on the quality of delivery available to the public, including older adults.
- 3.57 On current evidence, the guidance services operating in Scotland, Wales and Northern Ireland are more efficient and creative than the English system because they have been prepared to build on the legacy that was already there, including the experience and professionalism of the existing staff. England still has a long way to go.

E-guidance

- 3.58 E-guidance is playing an increasingly important role within guidance delivery, and has the potential to make a marked contribution in enhancing and extending guidance services for many older adults. However, although the number of older adults who are computer-literate and familiar with the web is fast increasing, there is no means at present of knowing how many are using ICT for career guidance purposes.
- 3.59 Through means of ICT, guidance practitioners now have an expanding number of ways in which they can deliver services to clients and facilitate decision-making and choice. Methods include: email; chat; text messaging; on-line discussion; e-learning; websites; video conferencing; on-line diagnostic interest and skills inventories; psychometric tests; databases of work, learning and volunteering opportunities; on-line LMI; and guides on such areas as CV preparation and jobsearch^{147 148}. Although very few of the guidance and guidance-related resources made available via email and the web are specifically aimed at the 45+, older adults can profit considerably from these facilities. However, the vast majority of those who can benefit have access to computers, and have the skills to use them. Reference has already been made to the digital divide (paragraph 1.12), which is especially acute among older age groups.
- 3.60 As the demand for guidance increases, so e-guidance offers a more cost-effective means of responding to demand – or, more accurately, to aspects of that demand. E-guidance should not be seen as a replacement for more personal guidance methods. Rather, it enables guidance practitioners to provide help and support to much greater numbers of people and over much wider areas (invaluable for older adults living in more remote areas), and acts as a filter so that individuals and practitioners can identify more precisely those who require more personalised help.
- 3.61 There are key areas of third-age guidance which e-guidance methods cannot readily influence – for example, in changing ingrained attitudes towards learning and work, restoring self-esteem and instilling motivation, and helping individuals to relate opportunities to their own personal circumstances. Many people also want the opportunity to discuss their own situation with an expert. Much of the information on the web is ephemeral, surfing is notoriously chancy, and it can be very difficult for people to know whether they have access to the full range of information they require.
- 3.62 Some e-guidance approaches are basically personalised guidance delivered at a distance –

for example, the use of emails and video conferencing – and require the intervention of highly skilled guidance practitioners. E-guidance tools also need regular updating and development. Currently there is an acute need to adapt, develop and update methodology in order to meet the needs of older age groups. The National Resource Service should help to identify this gap in the current market.

Information and helplines

- 3.63 Between 2000 and 2002 the East Midlands Development Agency (emda) financed and piloted a dedicated information line on learning and work – Mature Connections – specifically targeted at adults over 50. The pilot was well used and welcomed by older adults, and has helped to prove the value of targeted information and helplines in work with the 50+.
- 3.64 A number of IAG Partnerships have established their own information and helplines, but aimed at all adult age groups. A number of these (for example, the highly-regarded LSC-financed North Yorkshire Learning Helpline) have developed from the nationally-led but locally-based Training Access Point (TAP) initiative, introduced by the last government but discontinued by the current administration. It is impossible to provide a precise assessment of the number of older adults who use local information and helplines, but there are strong indications that the number of enquiries increases when learning initiatives are introduced of particular interest to older age groups - for example, byte-size learning, which appeals to large numbers of older learners.
- 3.65 The national learning information helpline, learndirect, will become a main 'door' for IAG services in England under the current restructuring (above) and this should further widen its appeal. Links between the national learndirect service and lead contractors in each of the 47 IAG Partnerships are intended to be speedy, and callers in need of and eligible for 'extended advice' (i.e. those with below level 2 qualifications) will be put through to the local service so that appointments can be made. Outside normal working hours the contact between learndirect and local service will be by email¹⁴⁹.
- 3.66 It is not known how many callers to the national helpline are 45/50+. However, learndirect is likely to increase its appeal to older age groups, if and as it is able to extend its coverage of local courses. There could also be considerable value in learndirect organising targeted third-age marketing strategies to attract potential older learners, and assure them that they are welcome and needed.
- 3.67 A particular problem for learndirect, which it shares with IAG Partnerships, is how to respond to adults who have achieved level 2 qualifications (and who are therefore not eligible for 'in-depth advice') but whose circumstances confirm that they require in-depth services. Adults aged 45/50+ are likely to constitute a high percentage of this number.

National and international fora

- 3.68 In June 2001, representatives from relevant government departments, guidance services, national bodies and guidance professional associations from England, Northern Ireland, the Republic of Ireland, Scotland and Wales met in Belfast to explore practical ways in which national organisations and agencies in the five nations might work together to improve guidance services and learn from each other's experience¹⁵⁰. The outcomes of the policy consultation are important for the future of third-age guidance in the UK. In particular, the consultation recommended that the 'home nations' should put in place mechanisms that enable relevant information, experience and research to be shared on a continuing and easily accessible basis.
- 3.69 The DfES-funded and supported National Guidance Research Forum (NGRF) is the most

¹⁴⁷ Madahar, L. & Offer, M. (2004). *Managing E-Guidance Interventions within HE Careers Services*. Manchester: Graduate Prospects.

¹⁴⁸ Offer, M. (2004). *The National Resource Service: a Framework for Identifying Needs and Resources to Meet Them*. Unpublished paper.

¹⁴⁹ Dent, G. (2004). The English IAG Policy Framework: a perspective from the learndirect advice service. in *NAEGA News and Views*, Summer.

¹⁵⁰ Ford, G. (2001). *Home Internationals 2: Lifelong Guidance for Economic and Social Success*. Cambridge: National Institute for Careers Education and Counselling.

prominent initiative taken forward by the consultation. The NGRF is a collaborative project which is being developed by the Guidance Council and the National Institute for Careers Education and Counselling (NICEC), in partnership with the Institute for Employment Research (IER) at the University of Warwick, and the Centre for Guidance Studies (CeGS) at the University of Derby. Its purpose is “to improve the capacity, coherence, quality and co-ordination of UK research on career guidance by acting as a ‘focal point’ for dialogue in the UK between guidance researchers, organisations providing guidance services, guidance professionals and policy makers.”¹⁵¹ The intention is that the NGRF “will promote and facilitate a much stronger evidence base for policy formulation and practice in careers work”.¹⁵² The foundation of the NGRF should provide invaluable help to those making the case for much greater focus on the guidance requirements of older adults, by further strengthening the evidence base.

- 3.70 As yet, there is no UK-wide National Guidance Policy Forum where stakeholders from the four ‘home nations’ can work together to improve the quality of guidance services and identify and compare best practice. It was hoped that the Guidance Council would be able to provide the platform required but so far this has not materialised. However, the European Commission has agreed to finance an initiative to develop new national fora for guidance in member states. The Guidance Council is expected to play a central role in this development, and this may provide the incentive necessary to bring the four nations more closely together.
- 3.71 At international level, there are plans to develop an International Centre for Career Development and Public Policy, building on the reviews of national career guidance policies undertaken by OECD, the World Bank and the European Commission. It is intended that the International Centre will:
- (i) maintain and extend networking between international organisations involved in guidance policy and practice, and encourage them to build on each other’s work.
 - (ii) support and facilitate international collaboration on evidence-based policy development, for example on impact evaluation.
 - (iii) sustain and develop the valuable and constructive dialogue between policy-makers and career development professionals which has resulted from the recent international reviews¹⁵³.
- 3.72 These are important initiatives for the future of career guidance, and could prove strategically so in highlighting the guidance needs of older adults – in the UK and at international level. Potentially, the scope the three fora can provide for exchanging experience on effective practice and mounting joint initiatives across nation states is very considerable. If the necessary synergy can be created between these three important developments, they could help considerably in reinforcing the critical importance of third-age guidance for older individuals, and for nation states confronted with the economic and social realities of demographic change.
- 3.73 In the UK, the Guidance Council is progressing an alliance with NIACE. This could help to provide adult career guidance in England in particular – but also in the UK – with the influential voice within central government which it has previously lacked. NIACE has for many years championed the crucial role of adult guidance within learning and work, and was responsible for the Unit for the Development of Adult and Continuing Education (UDACE) created by the Secretary of State for Education and Science in 1984. UDACE took a particular interest in adult guidance and published the seminal report, *The Challenge of Change*¹⁵⁴, in 1986, which placed guidance at the centre of effective adult learning policy and practice. In 1995, NIACE launched the Older and Bolder programme with the aim of promoting and developing better learning opportunities for people aged 50+, and raising

awareness of the need for wider access and participation in learning by older age groups. NIACE is well placed to champion the guidance requirements of older adults and through the Older and Bolder programme is already doing so. The alliance with the Guidance Council should strengthen NIACE’s ability to influence the accessibility, quality, range and extent of third-age guidance provision.

Third-age specialist agencies

- 3.74 In 1996, when third-age career guidance facilities were first mapped,¹⁵⁵ a considerable number of local targeted initiatives existed, often owing their origins to older adults who had themselves been made redundant. Particularly interesting examples included the POPE (People of Prior Experience) Project in Bradford and the University of Warwick Business School’s HOST project, both of which specialised in helping redundant older adults to regain employability and self-esteem through programmes of tailored learning, guidance and mentoring, and work experience. These and other initiatives were dependent on short-term funding and many have since disappeared, often victims of restructuring affecting their main sponsors. Although provision and geographical coverage were decidedly fragmentary, the available evidence suggested that they were generally successful, and in some cases (e.g. POPE and HOST) markedly so.
- 3.75 Although the number of third age-targeted initiatives has declined since 1996, some have continued and others developed since. Some examples¹⁵⁶ include:
- *The 50+ Challenge employment project within the University of Strathclyde Senior Studies Institute*, which provides a service combining learning, guidance and peer mentoring to older adults seeking employment in the paid, voluntary and self-employed sectors.
 - *The Experience Works Centre at New College Nottingham*, opened in 2001, and providing a combination of career guidance and counselling, job-search and work placements, self-employment support, learning provision, and confidence building for older adults.
 - *The Genesis Association in Wales and the North West*, which provides unemployed older adults with guidance and support services, and is staffed entirely by older volunteers.
 - *New Challenge Ltd in Brent*, which offers older adults a number of services including help with interview techniques, CV preparation, written applications, motivation-building and employability training, and has developed strong links with local employers so that it can provide work experience as well as good opportunities for actual placements.
 - *Target Third Age York*, whose services for older adults include learning (it is a learndirect centre), employability training, guidance and mentoring, work experience and work placements. Target has strong links with many local employers and uses job diagnostic techniques to help SMEs identify their training needs, including those of older employees.
 - *Under the Hill* in Havant, which is a community-based project to support unemployed adults aged 50+ into work. It is run by the local Employment Resource and Support Centre and is supported by a number of organisations including ESF and Havant Borough Council.

3.76 The available statistics indicate that these initiatives are generally successful in helping

¹⁵¹ Guidance Council (2004). *The National Guidance Research Forum*. Winchester: The Guidance Council.

¹⁵² *Ibid.*, page 1.

¹⁵³ Watts, A.G. (2004). *Career Guidance Policy: a report on the OECD, EU and World Bank Review*. Address delivered to the International Symposium on ‘International Perspectives on Career Development’ organised by the International Association for Educational and Vocational Guidance and the National Career Development Association, and held in San Francisco on 29-30 June 2004.

¹⁵⁴ Unit for the Development of Adult and Continuing Education (1986). *The Challenge of Change: Developing Educational Guidance for Adults*. Leicester: NIACE. An edited version of this Report was published by the National Association for Educational Guidance for Adults (NAEGA) as an Occasional Paper in Autumn 2003.

¹⁵⁵ Ford, G. (1997). *Career Guidance in the Third Age: a Mapping Exercise*. NICEC Project Report. Cambridge: CRAC.

¹⁵⁶ Third Age Employment Network (2004). *Members’ Directory and Briefings*. London: TAEN.

many older adults into work and learning (paragraph 2.16). Feedback from the older individuals who have used third-age specialist agencies is highly positive. For example, features of Target Third Age York that clients particularly welcome include: the warm and supportive atmosphere; the encouragement they receive from the staff and from each other; and the patience and teaching skills of the tutors¹⁵⁷.

- 3.77 The emphasis that older adults place on the personal skills and qualities of the staff is significant. Most of these projects are also active and recognised members of their local IAG Partnerships, and a number of government agencies have shown interest in establishing more services targeted at the 45+ and based on the existing models such as Experience Works and Target. However, so far this interest has not resulted in any significant increase in specialist provision over and above the existing services. Clearly, if government funds ‘spin-off’ projects and they are to succeed, it will be essential to retain the human qualities of genuine warmth, mutual trust and dedicated commitment, which underpin the achievements of the existing models. The Challenging Age research has shown that older adults are particularly sensitive to sole concentration on targets (paragraph 3.2), and any move to bureaucratise these caring and effective projects could jeopardise their continued success.

Private employment agencies¹⁵⁸

- 3.78 A number of well-known employment agencies, such as Angela Mortimer, Manpower, and Office Angels, openly encourage and welcome applications from suitably qualified and experienced older adults. There are also an increasing number of employment agencies that specialise in providing services for the 45+ and work closely with local employers to identify and create suitable opportunities, and help them to prepare for the impending age legislation.
- 3.79 Some of these agencies – for example FiftyOn, Jobsforover40s.com and the Still Useful Group – provide job-search and job application services principally or entirely online. Others liaise closely with local learning providers so that they can refer clients to them in order to improve and extend clients’ skills and qualifications and therefore their overall employability. An example is Encore Recruitment in Leeds, a small employment agency which helps to find suitable work employment for older adults throughout West Yorkshire and has received government financial assistance to support this work. 40+ Limited in Liverpool provides similar services.
- 3.80 Some specialist employment agencies, such as Wise Owls in East London, combine online services, a database of learning opportunities and individual interviews and placements, with personal advice and support, and training in IT and employability skills. Another example is Agewise Recruitment in West London, which aims to provide similar services.
- 3.81 These are welcome developments, although as yet the number of private agencies specialising in finding a diverse range of employment opportunities for older adults, and linking jobs to learning and skills training, remains low. It would also be helpful if all employment agencies providing guidance services could be encouraged to attain the matrix Quality Standard for information advice and guidance services for which the Employment National Training Organisation is now responsible to DfES. For many adults with level 2 and above qualifications the private agencies – including the private employment agencies – could be a main source of guidance (although the range and depth of guidance activities provided by individual agencies is likely to vary considerably). The matrix Standard would act as an assurance to the public, and also to front-line guidance staff in the publicly-funded guidance agencies who may need to refer clients on for more in-depth guidance, that the private companies provide services of a comparable standard to the public services.

Peer support

- 3.82 Guidance and learning providers working with groups of older adults find that the 45+ have a natural tendency to form their own peer support groups, and often so within very short periods of time. These groups are essentially altruistic and are invaluable in helping older people to: regain confidence and motivation; re-establish direction; extend networks; obtain work; progress in learning; and implement action plans. Peers may also provide much needed personal support. Some third-age initiatives, for example Experience Works! at Loughborough College (recently closed), have capitalised on this instinctive human tendency in order to provide training for older adults in peer mentoring skills¹⁵⁹. This training is transferable to other situations including mentoring other age groups, coaching and training, and voluntary work. 50+ Challenge at the University of Strathclyde has also made considerable use of peer mentors in providing guidance support.
- 3.83 The concept of peer mentoring also underlies the designation of ‘learning champions’ – within industry and within local community. The Challenging Age project identified a number of examples of third-age learning champions working in the community to encourage their peers to take up learning. Examples include: Northallerton College in North Yorkshire, which has worked with learning champions to encourage older people to learn IT skills in remote rural communities; and a number of community-based schemes in Sunderland, where older adults well known in their own communities have developed naturally into committed learning champions promoting learning to their peers, and often to younger other age groups as well¹⁶⁰. These developments often go beyond ‘word-of-mouth’, because the ‘champions’ work closely with the learning and guidance providers in a semi-structured capacity in order to provide support and encouragement, and possibly disseminate examples of other older learners in the community who have taken up learning, and may have obtained personally fulfilling employment as a result. Use of significant peer ‘case studies’ can be very effective in encouraging older adults to learn.
- 3.84 The principle of peer mentoring also underlies local ‘computer buddy’ projects; many of the ‘computer buddies’ and their ‘mentees’ are older adults. Hairnet UK, an enterprising and successful ICT training company, has developed the third-age mentoring concept commercially by training computer literate older adults in training, mentoring and support skills so that they can work individually with older peers in their homes and at work.
- 3.85 Perhaps the most significant – and certainly the best known – example of the use of peer mentors is the TUC Learning Service’s development of Union Learning Representatives (ULRs). Currently there are estimated to be approximately 8,000 ULRs operating in 3,000 workplaces and 100 workplace learning centres¹⁶¹. Five out of six ULRs are 35+¹⁶² and significant numbers of those they are helping are older employees who lost out on learning when they were at school. ULRs are all volunteers who are trained for the work, and who are likely to have credibility with, and be trusted by, their peers on the shop-floor.
- 3.86 In those companies where ULRs are given the full support of management and time off for ULR functions, main responsibilities can include:
- Working with employees to help them understand that engagement in lifelong learning is in their own individual interests.
 - Identifying the learning needs of employees, including basic-skills learning requirements, and feeding these back to management to support the case for work-based learning. ULRs are essentially advocates – or ‘champions’ – of lifelong learning and guidance. Many have negotiated successfully with management for

¹⁵⁷ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups. Appendix 7*, page 19. Sheffield: DfES.

¹⁵⁸ Third Age Employment Network (2004). *Members’ Directory and Briefings*. London: TAEN.

¹⁵⁹ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups. Appendix 7*, pages 3-4. Sheffield: DfES.

¹⁶⁰ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*, pages 47, 52. Sheffield: DfES.

¹⁶¹ This figure was cited by speakers at a TUC Conference in London on 6 July 2004, *Union Learning Fund – Making a Difference, Changing Lives*. Main speakers included the TUC General Secretary, the Chancellor of the Exchequer, and the Secretary of State for Education and Skills.

¹⁶² York Consulting (2003). *TUC Learning Services: Union Learning Representative Survey*. London: Learning Services, Trade Union Congress.

appropriate provision, and have worked closely with management to develop lifelong learning and guidance facilities, including the formation of company learning centres.

- Providing employees with individual support, including help in overcoming initial reluctance to learn and learning problems caused by low confidence¹⁶³.

- 3.87 The TUC's ULR initiative is impressive, and Government is keen to see the work, and the numbers of ULRs, expanded. However, the York Consulting ULR evaluation report points out that "there continue to be differences in the scope and scale of activity undertaken by individual ULRs"¹⁶⁴. ULR effectiveness depends on a number of factors, including the full support of management, time off for ULR activity, and continuing support from their unions and from IAG Partnerships. These are not always forthcoming. Regional TUC and individual unions are often active members of IAG Partnerships and act as a bridge between ULRs and IAGPs, ensuring that ULRs understand the local services available and that IAG Partnerships implement strategies (including training programmes) to support ULRs in the workplace.
- 3.88 The TUC does not envisage ULRs to be guidance experts, but rather trained and trusted peer mentors who can provide support to their colleagues, and who have an extensive range of contacts, including agencies that can help older age groups. If ULRs are to be effective, they need the continuing support of efficient local networks of learning and guidance providers.
- 3.89 A number of 'learning champion' initiatives have also been launched in non-union workplaces, and TUC Learning Services has contributed to these developments¹⁶⁵.

Career guidance support and development in the workplace

Provision

- 3.90 Career guidance support within the workplace remains under-developed for all age groups^{166 167}. Few adults aged 45+ report that they have received any help with career development from their employers or guidance support at the point of redundancy; they would have appreciated such assistance.¹⁶⁸ Although a number of employers realise the importance of in-company career guidance, much of the current provision is aimed at senior-level staff and potential 'high-flyers'^{169 170 171}. ULRs working with less qualified employees, including many older workers, may lack the strong support they require both within and outside their organisations (paragraph 3.87)^{172 173}.
- 3.91 A number of recent government initiatives (the LSC Quality Development Fund, DFES Guidance Pilot and Employer Training Pilots – see paragraphs 3.46 and 4.27-4.34) have developed guidance services for industry and have helped to demonstrate their value both for employers and their employees (see above)^{174 175 176}. In Scotland, Wales and Northern Ireland, the extension of guidance services to industry has proved equally successful.

¹⁶³ Ford, G. & Watts, A.G. (1998). *Trade Unions and Lifelong Guidance*. Cambridge: National Institute for Careers Education and Counselling.

¹⁶⁴ York Consulting (2003). *TUC Learning Services: Union Learning Representative Survey*, page 27. London: Learning Services, Trade Union Congress.

¹⁶⁵ Learning and Skills Council (2003). *Developing Local Information, Advice and Guidance Services: A Report on Local Quality Development Fund Projects 2002/2003. Case Study 17: Cumbria: Advocate Systems in Non-Union Companies*. Coventry: LSC. (This is one of several examples.)

¹⁶⁶ Chartered Institute of Personnel and Development (2003). *Managing Employee Careers: Issues, Trends and Prospects*. London: CIPD.

¹⁶⁷ Hirsh, W. (2003). Career management - meeting the challenge? In *Reflections: Trends and Issues in Career Management*. London: Chartered Institute of Personnel and Development.

¹⁶⁸ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DFES.

¹⁶⁹ Chartered Institute of Personnel and Development (2003). *Managing Employee Careers: Issues, Trends and Prospects*. London: CIPD.

¹⁷⁰ Hirsh, W. (2003). Career management - meeting the challenge? In *Reflections: Trends and Issues in Career Management*. London: Chartered Institute of Personnel and Development.

¹⁷¹ Rolph, J. (2003) 'Managing careers - from privileged perk to opportunity for all' in *Reflections: Trends and Issues in Career Management*. London: Chartered Institute of Personnel and Development.

¹⁷² Trade Union Congress (2003). *ULRs' Perceptions of New Learning Through Work*. London: TUC.

¹⁷³ York Consulting (2003). *TUC Learning Services: Union Learning Representatives Survey*. London: TUC.

¹⁷⁴ Learning and Skills Council (2003). *Developing Local Information Advice and Guidance Services: a Report on Local Quality Development Fund Projects 2002/2003*. Coventry: LSC.

¹⁷⁵ Institute of Employment Studies (2003). *New Deal 50plus: Sustainability of Employment*. Sheffield: Department for Work and Pensions.

¹⁷⁶ Institute of Employment Studies (2003). *New Deal 50plus: Sustainability of Employment*. Sheffield: Department for Work and Pensions.

Economic benefits

- 3.92 Career guidance in the workplace, which is genuinely age diverse, has significant advantages for employers, older employees and the economy. Employees who have received positive career guidance gain: a clearer picture of their future career direction; self-insight; information about career opportunities within and (where relevant) outside their organisations; and greater motivation through reassurance and feeling valued. As a consequence more employees engage in development opportunities and take action to improve their career skills^{177 178}. Employees gain a more highly motivated and skilled workforce, which – although there are difficulties in measuring this precisely – has an impact on productivity and profitability. Older adults who are motivated and update their skills 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. Valuable experience and knowledge are retained within companies and there can be large savings in recruitment costs^{179 180 181 182}. Growth in the numbers of productive older workers who are retained by their employers makes significant contributions to the national economy, and lessens the risks of increasing third-age unemployment and escalating benefit, health and other costs.
- 3.93 It is important that the economic benefits of providing career guidance and development support for employees, irrespective of age and status, should be communicated clearly to employers. The Chartered Institute of Personnel Development (CIPD) and the Work Foundation¹⁸³ are increasingly active in promoting the importance of in-company career development support their member companies, many of which have HR or equivalent departments. The need now is to find effective ways of communicating good practice to SMEs. A number of IAG Partnerships in England have produced guides on career development for employers, including work-based guidance services provided by the Partnerships themselves, but these may need to be revised in the light of the refocusing of IAG Partnership advice and guidance on adults with below Level 2 qualifications. The Careers Scotland, Careers Wales and EGSA (Northern Ireland) websites contain targeted information on the services these organisations provide for local employers, including provision that may be costed.
- #### Listening to older employees
- 3.94 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. Key issues of concern to older employees include the following. In each case the issues are also of national importance and require detailed attention at national level.
- #### The relationship between ageing, work and health
- 3.95 Older adults tend to have less time off work: but when they do, this can be of longer duration. In general, employers tend to make few if any adjustments in the workplace that may enable older workers to continue working for longer periods before retiring. Simple examples of ergonomic adjustments might include: enabling shop assistants to sit down more frequently; providing older employees with more opportunities for short 'mini-breaks'; and introducing working practices to minimise the chances of older workers developing back problems, for example care workers. Some other countries have conducted extensive research on the effects of ageing in particular occupations and how to extend working life through ergonomic improvements.

¹⁷⁷ Hirsh, W. (2003). Career management - meeting the challenge? In *Reflections: Trends and Issues in Career Management*. London: Chartered Institute of Personnel and Development.

¹⁷⁸ Hirsh, W., Jackson, C. & Kidd, J. (2001). *Straight Talking: Effective Career Discussions at Work*. NICEC Project Report. Cambridge: National Institute for Careers Education and Counselling.

¹⁷⁹ Age Positive (2002). *Being Positive about Age Diversity at Work: a Practical Guide for Business*. Sheffield: Department for Work and Pensions.

¹⁸⁰ Age Positive (2004). Age Positive website: case studies of age-diverse employers. www.agepositive.gov.uk

¹⁸¹ Employers Forum on Age (2003). *One Step Ahead: Policy Review Toolkit: Quotes from the Employers Forum on Age: Feedback from EFA Members*. London: EFA.

¹⁸² Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Sheffield: DFES.

¹⁸³ Hirsh, W. & Jackson, C. (2004). *Managing Careers in Large Organisations*. London: The Work Foundation.

The longitudinal research programme conducted at the Finnish Institute of Occupational Health is of particular note¹⁸⁴.

- 3.96 In the UK, the Health Development Agency completed the first phase of a research and development programme in 2003, financed by the Department of Health through the Public Health Development Fund, which has focused on promoting health and well-being in mid-life (50-65) and reducing health inequalities in older age¹⁸⁵. The second stage of this programme concentrates on the workplace, and aims to assess the value of offering health support to employees, particularly to low-paid workers.
- 3.97 *The types of occupations that may be suitable for older adults*
Many older adults are mentally and physically able to continue working in the same occupations past conventional retirement ages. However, manual workers in particular may encounter difficulties in later middle age and require retraining in alternative occupations. For some older adults, retention in the same occupation may not be an option, although they may wish to continue working and have much to offer in terms of skills, potential and experience.
- 3.98 There are key issues here that are central to the relationships between ageing, work and health, and that become of fundamental national importance if, and as, older adults are encouraged and expected to work for longer – and need to do so for various reasons including financial ones. The whole issue of alternative occupations in later working life requires much more concentrated study. Age legislation by itself is not sufficient to guarantee retention. Age legislation needs to be accompanied by a national programme of research to identify alternative areas of work for significant numbers of older individuals, including manual workers.
- Getting off the treadmill*
- 3.99 Considerable numbers of older workers want to escape from their current work, but not necessarily into retirement.¹⁸⁶ Some may have been in the same job for too long, have developed new interests, or are aware of previously undeveloped talents and potential. Many – as the Challenging Age Research made clear¹⁸⁷ – are disenchanted with uncaring management attitudes, sole concentration on making money to the exclusion of human values, the target culture, and frequent reorganisation. They want greater autonomy and to be trusted. ‘Retirement’ can seem to offer a new life but – unless ‘retirees’ can find suitable alternative employment (and many cannot) – it can also represent a trap.
- 3.100 Career guidance and career development support strategies are in themselves ways of valuing people, and people who feel valued and wanted are much more productive. This is a simple truth, understood by many older workers, but one which can be difficult to communicate to many employers and managers¹⁸⁸. If employers are prepared to listen to, and learn from, the feedback which can be obtained from career development strategies that are genuinely comprehensive in their coverage of staff and that include all age groups, they are more likely to have access to invaluable information and feedback from the frontline workforce that could transform the efficiency and productivity of their companies.
- Preparing for retirement*
- 3.101 Eventually most people face retirement from paid work; and career development is also about helping employees to develop the skills, knowledge and attitudes to cope

successfully with this transition. For many, the actual experience of retirement can prove traumatic; preparation for active retirement should constitute a priority area for company career-support strategies.

- 3.102 Some employers help employees to prepare gradually for retirement through downshifting, including job-share arrangements and providing opportunities for service in the community. These activities are integral to the career development process. Some companies (although still a relatively small number and normally the larger employers) provide access to pre-retirement courses, although only a limited number of these courses are designed to equip employees for an active ‘next stage’ of life. Financial issues may well have a higher profile than opportunities for paid work (including part-time work and self-employment), learning and volunteering.
- 3.103 In the United States a number of companies have formed their own company employment agencies of ‘retired’ staff willing to work on particular projects, cover sickness and holidays, and work at busy periods. In the UK there remain problems about working for an employer from whom one is drawing a pension, although action to resolve this issue has been promised by Government. A relatively small percentage of large companies organise retired employee associations, and these can provide important advice, guidance and support – including peer support – to older adults aged 60+ on a range of issues.¹⁸⁹ Many retired adults feel isolated from sources of support, often because they do not know where to go for help or how to articulate their feelings and requirements. This represents a complete waste of older people’s abilities and experience which, through more structured guidance and personal encouragement, they could offer to their local communities.
- Investors in People*
- 3.104 The work being undertaken by CIPD, the Work Foundation, career guidance agencies in the four ‘home nations’ and other bodies, to extend career guidance support within the workplace, might be reinforced if the Investors in People quality mark specified the need for evidence of the quality of career development support strategies to support all employees, including older age groups and regardless of occupational status. The standard required might be linked to the DfES matrix Standards for information, advice and guidance¹⁹⁰.

¹⁸⁴ The Finnish Institute of Occupational Health, under the leadership of Professor Juhani Ilmarinen, has produced an extensive range of publications on mature workers and health. The publications include the results of studies on the effects of ageing on specific groups of workers, including teachers and public sector workers. Two publications that contain valuable overviews of the work of the Institute are:

Ilmarinen, J. (1999). *Ageing Workers in the European Union – Status and Promotion of Work Ability, Employability and Employment*.

Ilmarinen, J. & Louhevaara, V. (ed.) (1999). *FinAge – Respect for the Ageing: Action Programme to Promote Health, Work Ability and Well-being of Ageing Workers in 1990-96*. These and other FinAge research publications are available from the Finnish Institute of Occupational Health, Publications Office, Topeliuksenkatu 41 a A, FIN-00250 Helsinki (fax +358 9 477 5071).

¹⁸⁵ Bowes, H., Secker, J., Hanes, M., & Webb, D. (2003). *The Gap Years: Rediscovering Midlife as the Route to Healthy Ageing*. London: Health Development Agency.

¹⁸⁶ Grattan, P. (2003). *Work After 60 – Choice or Necessity, Burden or Benefit?* London: Third Age Employment Network.

¹⁸⁷ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Full Report and Appendices 1-7. Sheffield: DFES.

¹⁸⁸ Hirsh, W., Silverman, M., Tamkin, P., & Jackson, C. (2004). *Managers and Developers of Others*. IES Report 407. Brighton: Institute of Employment Studies.

¹⁸⁹ The Employers’ Retirement Association actively supports and encourages employer facilities to help and support ex-employees. A good example of a company that is active in supporting ex-employees is Procter and Gamble which organises a successful Associate Scheme, including publishing an extremely informative magazine for ex-employees, *The Associate*.

¹⁹⁰ Employment National Training Organisation (2004). *Well informed ... Well Ahead*. The matrix pack. Leicester: ENTO.

4 Lifelong Learning and Older Adults

Third-age learning requirements

4.1 The majority – but not all – of the adults aged 45+ attending the Challenging Age focus groups were inactive or unemployed. However, most had been in work until recently. The majority were also involved in learning or had recently attended education or training courses. It was therefore possible to obtain feedback on their reactions to work-related and non-vocational learning, in terms both of the conditions of provision and of the nature of delivery¹⁹¹. A number of the observations below therefore apply equally to both vocational and non-vocational learning, and distinctions can be difficult to draw, especially when much community-based learning can serve both purposes.

4.2 The feedback from people aged 45+, and from the front-line workers working with them, indicate the following:

(i) *Benefits of learning*

Learning brings important benefits to older people, including: the development of work skills to improve paid employability, and equip them for volunteering and active citizenship; improvements in health and self-confidence; opportunities for social contacts; and strengthening of individual networks, including those that may lead to jobs.

(ii) *Attitudes*

Many older people – including those in employment – consider themselves too old to learn, and particular groups are reluctant to engage in learning or are encountering difficulty in doing so. Notable examples include: older men, especially those living in areas with no tradition of learning¹⁹²; and the less mobile and rurally isolated. Particular efforts need to be made to reach out to these groups, and significant progress can be made, and is being made, in targeting particular geographical areas. This may include help in arranging suitable transport.

However, there are older people living in all communities who for various reasons are experiencing forms of isolation, and who could be helped if they felt that learning had something to offer them and that they would be welcome by the tutorial staff and other learners.

(iii) *Consultation*

Significant numbers of older adults want colleges and other providers to consult them about the choice, suitability and content of courses, and appropriate learning delivery, before courses are organised and again while they are in progress. Some of those interviewed expressed concern about top-down provision, which appears to suit the needs of provider organisations and tutors rather than the students. Failure by some practitioners to appreciate the desire that many older adults have for consultation and involvement helps to explain why some learning providers and Learning Partnerships have concluded that older adults are generally not interested in the learning on offer, and therefore that many older adults are not interested in learning per se. This is an unfortunate non sequitur, and based on inadequate information.

(iv) *Cost*

The question of cost is a priority issue for older adults. Many – and especially those who are inactive and on benefits – are living in varying degrees of poverty.

Even where older people may be able to pay for training to enhance employability, there is a reluctance to pay unless the training can be guaranteed to lead to employment, and they will not make a financial loss or be left in debt.

(v) *Recruitment and entry*

Older people considering a return to learning can be put off at the recruitment and entry stage: feedback suggests that recruitment and entry can be strengthened by:

- Developing actively inclusive policies, and ensuring that older people are positively welcomed and helped to understand that learning is relevant to them. The personal and telephone skills of reception staff can be crucially important.
- Providing sufficient detail on course content to enable potential learners to make informed decisions on individual value and relevance. Many Challenging Age participants were critical of brochures that listed course titles but gave little information about content. Some were also concerned that open days and enrolment days had virtually disappeared, so that there was little opportunity to discuss course content and learning methodology with course tutors in advance.
- Assessing learning needs (including basic skills and learning difficulties) and learning styles so that learning can be tailored to meet individual requirements, and the necessary level of support provided accordingly.
- Offering learning tasters – these are widely appreciated by older age groups.

(vi) *Outreach*

Many learning providers have introduced an extensive range of outreach initiatives to improve access to learning, a number of which are either aimed at – or are likely to attract – older age groups. These are welcomed by older adults and include the following:

- Home-based provision for people with disabilities and mobility problems.
- Mobile and outreach services, for example the use of mobile libraries and IT buses.
- Outreach learning provision, which is readily transferable to a number of locations.
- Use of technology to increase access to tuition.
- Community-based learning in rural areas and town/city estates, often based at venues where other community activities and IAG are also available.
- Drop-in learning centres in shopping centres and high-street locations which are easily accessible and enable learning to fit in with people's daily activities.
- Transport to learning provision organised for people in rural areas.

(vii) *Child-care facilities*

In many cases grandparents, and not the parents, look after the children during the day. Caring responsibilities can be one main cause of third-age inactivity in terms of paid work, with consequences for pension entitlement. Child-care provision may therefore be essential if older people, and especially older women, are to be enabled to learn – including equipping themselves for possible return to work. Courses may also need to be organised to fit in with the school day.

(viii) *Delivery*

Many older learners appreciate learning approaches that may differ in important aspects from those suitable for younger age groups. Although preferred learning styles inevitably vary between individuals, a high percentage of focus-group participants expressed preferences for the following learning conditions and approaches:

- Informal learning environments and approaches, including community-based and outreach provision, drop-in facilities, and the opportunity to study at one's

¹⁹¹ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*, pages 55-66 and Appendices 1-7. Sheffield: DFES.

¹⁹² Veronica McGivney of NIACE has written two valuable studies, exploring the reasons why many men are reluctant to learn outside the workplace and – drawing on case studies – suggesting some ways in which they might be attracted into learning. These are: McGivney, V. (1999). *Excluded men: Men who are Missing from Education and Training*. Leicester: NIACE. McGivney, V. (2004). *Men Earn, Women Learn: Bridging the Gender Divide in Education and Training*. Leicester: NIACE.

own pace.

- Courses and provider organisations where older people are positively welcomed.
- Some participants want provision specifically designed to meet the needs of older age groups; others prefer multi-generational provision. Ultimately, decisions about targeted and non-targeted provision are likely to be determined by the requirements of the older people concerned, and the availability of the necessary funding to meet those requirements.
- Small groups and one-to-one support especially for IT-based training.
- Patient, empathetic and encouraging tutors; and extra support for older people where needed. The presence of older tutors is appreciated.
- Opportunities for peer support.
- Day-time courses for some older people. Whilst people over 45 may be happy about attending evening courses, many people aged 65+ who have retired from paid work have a preference for day-time provision.
- Help in handling modern teaching and learning styles.

(ix) *Nature of provision*

Provision should be regularly reviewed to ensure that it meets learner demand and requirements, including learning to enhance and improve employability. Up-to-date knowledge of the current and projected needs of employers and the labour market, and of the policies and expectations of employers in respect of older people, is essential.

On the evidence of the feedback received from focus groups and front-line workers, local requirements are likely to include:

- Learning opportunities that enhance and improve employability. As well as activities that help to improve self-confidence, this may include training in such areas as skills analysis, CV preparation and self-presentation – including techniques that may help to overcome age discriminatory attitudes by employers and in the workplace.
- Opportunities to retrain and up-skill that relate directly to local labour market requirements.
- IT training in order to improve employability and job search, but also to improve personal effectiveness more generally.
- Training courses and individual coaching for people interested in self-employment, or setting up their own businesses.
- Learning opportunities that facilitate social contact and personal fulfilment, and help to develop skills and opportunities for voluntary work and active citizenship.
- ‘Return to Learn’ and ‘Return to Work’ courses - these can attract considerable numbers of older people.

(x) *Specialist learning provision*

Views tend to differ about the extent to which people favoured separate learning provision for older adults or the opportunity to learn in wider age groups. Individual preferences will inevitably be shaped by personality and circumstances, and (very important for older age groups) level of personal confidence.

Evidence from the Senior Studies Institute at the University of Strathclyde shows preferences tend to vary between subject areas. Older students prefer to study subjects such as IT, art, languages and health and fitness with students of similar age groups and are happier to study subjects such as music, history and literature in classes with other age groups¹⁹³.

This suggests that the 45+ are often very conscious of their own learning styles, including a desire to be more methodical and have time to practise when they are learning new practical techniques, and where younger people may learn more quickly (although not necessarily so thoroughly). Older adults also welcome ready access to individual tutor and peer-group support when they are learning new techniques, and these are not necessarily so easily available in mixed age groups. Where mixed age groups in skills-oriented courses are unavoidable, the presence of older adults in the class may therefore call for considerable sensitivity and understanding from tutors.

Government policy

4.3 In 2001, 23% of people in work aged 50-59 received training, compared to 30% aged 20-49¹⁹⁴. Recent initiatives, including the Government’s ‘Learning for Life’ strategy, the Employer Training Pilots and the Trade Union Learning Fund initiatives, have almost certainly started to improve the overall figures for both age groups. However, all the initiatives are heavily subsidised. Therefore they do not necessarily indicate a change of attitude by many employers towards investment in employee training, including the training of older employees. A recent Age Concern report observes: “some employers believe it is a waste of money to invest in the training of older people because they will shortly leave the workforce”: a belief challenged by evidence that a 50-year-old employee is likely to stay with their employer for another 10-15 years whereas the average 20-year-old is only likely to stay for another two to three years¹⁹⁵. The same Report observes that the actions of employers who do not invest in older workers, because they consider that the abilities of older workers are in decline, tend to sideline and demotivate their older employees. As a consequence the employers’ assumptions become a “self-fulfilling prophecy”¹⁹⁶.

4.4 Government policy towards learning in the third age remains distinctly ambivalent. NIACE has pointed out that the terms of the Learning and Skills Act (2000)¹⁹⁷ do not provide a legislative framework that is sufficiently supportive of skills training for all adult age groups. The Act charges the LSC in England and the National Council for Education and Training in Wales (CETW) to “secure the provision of proper facilities” for the education and training of people under 19 (sections 2 and 31) but for those over 19 only requires the same bodies “to secure the provision of reasonable facilities” (sections 3 and 32). NIACE comments: “this means that, whatever the vision and analysis of the Skills Strategy, the reality is that the publicly-funded system has available for adult learning only what is left after the needs of young people have been met”¹⁹⁸.

4.5 Although the Government is notionally supportive of lifelong learning, the existing legislative framework provides neither a sufficiently supportive framework nor the national lead necessary for lifelong learning to thrive. For older adults, some aspects of government policy seem expressly designed to discourage lifelong learning. For example, older learners are debarred from taking out student loans from age 54. The House of Lords has described this as “blatant discrimination”¹⁹⁹. Adult Learning Grants – although available to any adult seeking their first level 2 qualification through full-time study – will only be available for adults wanting to take level 3 qualifications through full-time study up to the age of 30²⁰⁰. The proposals on fees, funding and learner support in Further Education put forward in a recent LSC Consultation Paper could increase the cost of learning within the statutory sector for many older adults²⁰¹, meaning that even greater

¹⁹⁴ Age Concern (2004). *The Economy and Older People*. London: Policy Unit, Age Concern England.

¹⁹⁵ *Ibid.*, page 25.

¹⁹⁶ *Ibid.*, page 25.

¹⁹⁷ Department for Education and Skills (2000). *Learning and Skills Act*. London: Stationery Office.

¹⁹⁸ NIACE (2004). *Lifelong Learning and the Spending Review*, paragraph 6. Leicester: National Institute of Adult Continuing Education.

¹⁹⁹ House of Lords, Select Committee on Economic Affairs (2004). *Second Report of Session 2003-04. Government Response to Aspects of the Economics of an Ageing Population: Report*, page 35, paragraphs 7.10-7.11. London: The Stationery Office.

²⁰⁰ Learning and Skills Council (2004). *Investing in Skills: Taking Forward the Skills Strategy: An LSC Consultation Paper on Fees, Funding and Learner Support in Further Education*. Coventry: LSC.

²⁰¹ *Ibid.*, all sections of the LSC Consultation Paper.

numbers may be unable to afford the costs of upskilling and retraining without concessions or additional support (e.g. from an employer). New Deal 50+ and other Jobcentre Plus training and work initiatives are normally only available to adults – including older adults facing the additional barriers caused by age discriminatory employment practices – after a waiting period of 6 months.

- 4.6 A recent government document on the economics of an ageing population describes government's strategy to meet the 'demographic challenges' as ensuring that "today's and tomorrow's *pensioners* (author's italics) are able to share in the rising national prosperity and enjoy economic security in retirement, without placing an unsustainable burden on future generations"²⁰². The document identified four strands in the Government's strategy:
- (i) targeting help on the poorest pensioners;
 - (ii) enabling future generations of pensioners to make informed choices on working and saving for retirement;
 - (iii) simplifying and strengthening confidence in the private and occupational pensions system;
 - (iv) providing flexibility in retirement and greater opportunity for later working²⁰³.

There is no reference to any fifth strand directed at encouraging adults aged 45/50+ to learn, up-skill, retrain, and develop their abilities so that they are enabled to contribute to the realisation of the government's skills strategy and to national productivity (through both paid and unpaid work).

- 4.7 The implications of these and other aspects of current Government policy towards older adults in respect of guidance, learning and the National Skills Strategy, are considered further in Section 5 of this Report.
- 4.8 The descriptions of learning initiatives that follow, below, show that there are a number of important examples of learning targeted at, or including, older adults that can provide the foundation for concerted third-age learning strategies and on which UK governments can build. Scotland in particular is leading the way in this respect. Only a small number of learning projects, or broader categories of learning initiatives, have been included. The list is not intended to be comprehensive.
- 4.9 The comparative success of these and other initiatives helps to explain why some statistical surveys show the numbers of older adults involved in learning as increasing²⁰⁴. However, there are considerable variations in some of the statistics, which can be explained by differences in categorisation: for example, in the extent to which they differentiate between: vocational and non-vocational learning; training paid for by employers or subsidised by the state; formal, non-formal and informal learning; and the various third-age groups (i.e. 45-49, 50-54, 55-59, 60-64, 65-69 and 70+.) The data collected needs greater standardisation so that: a true picture can be gained of third-age participation in learning; and annual data can be compared on a consistent basis.

Senior Studies Institute, University of Strathclyde

- 4.10 The Senior Studies Institute (SSI) at the University of Strathclyde is a development unique within higher education institutions. The SSI owes its origin to the activities of a small group of committed 'champions' within the University who decided in 1987 to pilot a 'Learning in Later Life' programme in the Community Education Centre. Over 200 interested older adults attended the initial open meeting, and the 'Learning in Later Life'

programme was launched. This proved so successful that the University established the Senior Studies Institute in 1991 "as a dedicated centre of excellence for lifelong learning for people over 50"²⁰⁵.

- 4.11 The prime objectives are to: encourage the continuing personal growth and intellectual development of older learners through an expansive programme of daytime classes, seminars and study trips; provide opportunities for people over 50 to use their learning and life skills in a range of socially valuable contexts – as family members, citizens, volunteers, or to prepare them for work or a career change; widen access to other University courses and expand the opportunities available in the community for older learners; encourage and support research into later life issues; and disseminate knowledge and awareness about the human resource value of the older population²⁰⁶. These are ambitious objectives but the University has succeeded in implementing them. It has established a third-age learning community in the heart of Glasgow, which has influenced and transformed the lives of families and communities in the City on an inter-generational basis. The University has received a number of national awards in recognition of its work.
- 4.12 About 2,000 older students are now involved in a wide range of non-accredited courses, credit classes (leading to an Open Studies Certificate), taster seminars, attendance at selected undergraduate courses, and part-time study within the undergraduate programme. Outreach programmes have been developed in under-privileged and rural communities, including older adults from ethnic minority groups. A spinning and weaving project on the Isle of Arran enabled older adults to pass on their new skills to others in the community.
- 4.13 Volunteering projects generated by the SSI have included the SPIN project (to support and help with the regeneration of spinal cord injured students in the Spinal Injuries Unit of a main Glasgow hospital); the University Guiding Project (arranging university tours for visitors and tourists around the University and central Glasgow); the Computer Buddy Project (to support and develop students' computer literacy); and 'the Tuesday Club', which provides temporary office assistance to University departments.
- 4.14 The SSI designed and delivers specialised training programmes for professional staff and undergraduates who are working, or wish to work, with older adults, thus cascading their experience and expertise throughout the University.
- 4.15 The SSI has generated, or is a partner in a number of important 'spin-off' projects. These include:
- *Glasgow 50+ Job Retention* – funded by the ESF and managed by the SSI in partnership with Glasgow City Council. The aim is to enable small businesses to expand and develop by increasing older worker skills and therefore improving employee retention. The initiative is based on the cost-effective Job Retention model, which a number of European countries have included in their labour market policies through legislation. The Glasgow project enables companies to release older employees for staff development and training. In return, previously unemployed older people substitute for the staff released for training and the project contributes to their salary for a 6-month period. This allows employers to release four or more older staff to participate in learning programmes, which are also paid for through the project. Glasgow 50+ Job Retention also offers companies training needs assessment, help in developing company training plans, a company mentoring programme and training in mentoring skills.

²⁰² House of Lords (2004). *Select Committee on Economic Affairs: 2nd Report of Session 2003-04: Government Response to Aspects of an Ageing Population: Report*. London: the Stationery Office.

²⁰³ *Ibid.*, page 5, paragraph 3.

²⁰⁴ *Ibid.*, page 15, section 11.14. This section cites the National Adult Learning Survey 2002 to show that, participation in learning by adults aged 50-59 has increased by 7% between 1997 and 2002 (from 67% to 74%) and by adults aged 60-69 by 4% (from 47% to 51%). However, there is no definition of mode of learning nor whether the adults concerned are involved in vocational or non-vocational learning.

²⁰⁵ Hart, L.A. (2001). *The SSI Odyssey 1991-2001: a Decade of Achievement*. Glasgow: University of Strathclyde.

²⁰⁶ *Ibid.*, page 3.

- *The Encourage Project* – established in 2002 to expand the involvement of people aged 50+ in the arts. The Project is targeted at older people in Glasgow who, for various reasons, have had limited opportunities to experience theatre, music, art and the other cultural activities that thrive in the City, or to take part in the arts themselves. This is a collaborative project with Glasgow City Council and the Dark Horse Venture (a voluntary organisation which promotes older people’s involvement in a range of activities and interests, and which has also established a similar project in Liverpool). A main objective is to influence and enrich the lives of whole families and communities throughout the City through the medium of the 50+, so that future generations are enthused to become involved in the cultural activities of Glasgow. The Encourage Project is built around a series of “arts packages”; the wide range of resulting activities have included workshops, visits, interviews with actors, artists, musicians and attendance at performances²⁰⁷. Encourage has proved immensely popular with participants, many of whom have gained in self-confidence and understanding through their involvement, and have signed up for other lifelong learning courses as a direct consequence.
- *The Scottish Work-Life Adaptability Network (SWAN) Equal Project* in which the SSI and Scottish Enterprise Lanarkshire are the principal partners (see paragraphs 4.19-4.22.)

4.16 Many factors have contributed to the SSI’s success. These include:

- Inspirational and visionary leadership of the SSI, committed and able tutors, and the support of senior university management.
- The ability to build links and partnerships on a national, European and world-wide scale with many other like-minded organisations.
- Entrepreneurial fund-raising from a variety of sources.
- The collaborative involvement of many older students. Tutors are paid not only to teach but to talk informally with students. The networking and social dialogue between students and the University, which this has encouraged, has helped to generate a number of initiatives. This includes the SSI (3L) Student Association which has a membership of approximately 800 students aged 50+ and arranges a wide range of social activities, initiates volunteering and other initiatives, and provides a forum for consultation on future programmes and developments.
- The responsiveness of programmes to the changing needs of students. For example, industrial closures and downsizing mean that adults aged 50-59 represent some 30% of the total SSI student population. Consequently there has been a growing demand for skill-based classes to enhance employability, to which the University has responded.
- Involvement of the students in many other aspects of University life.
- A range of learning and related activities that have enabled many of the students to obtain full-time and part-time work, or to be retained in their current employment because of their enhanced skills and employability.

4.17 The University of Strathclyde’s Senior Studies Institute demonstrates how much can be achieved, not only for older people but also for whole communities, when educational

institutions have the vision and willpower, and are able to raise the resources, to engage large numbers of a community’s 50+ population in lifelong learning – and, most important, to involve older adults closely in the implementation.

Scotland – Equal and other ESF-funded projects

- 4.18 Scotland is operating a number of interlinking projects funded by the ESF Equal Programme, some of which are targeted – or partially targeted – at older adults.
- 4.19 *The Scottish Worklife Adaptability Network (SWAN)* is part of a larger collaborative Project, the Worklife Adaptability Partnership. SWAN is managed by the SSI in partnership with Scottish Enterprise Lanarkshire. It is a partnership between a wide range of Scottish companies (especially small and medium-sized employers), their employees, and other organisations interested in developing new approaches to employment including: age-related employment practice; use of ICT; and work-life employment practice.
- 4.20 SWAN works with company management to develop their appreciation of the impact of demographic change and prepare them for the impending Age Equality legislation. This includes working with employees to help them achieve a more satisfying and fulfilling work-life balance, and therefore to be more productive. There is a particular emphasis on working with older employees, and helping them to develop the skills necessary to ensure retention in the workforce.
- 4.21 In addition to personal visits to companies, SWAN offers: events and training on work-life balance; training needs analysis; skills training for employees (in-house, external and online); and access to a database of 45+ jobseekers.
- 4.22 The Worklife Adaptability Partnership also operates the *Mobile Learning Initiative (MOLI)*, which uses a bus to deliver ICT and e-business training to companies situated in more remote communities. Many of the employees profiting from MOLI are 45+.
- 4.23 *Equal Access* is a development partnership of 15 organisations working together to help combat discrimination experienced by individuals and groups in the labour market. Key target groups include older ex-workers, people with disabilities, offenders and ex-offenders, and drug and alcohol mis-users. One of several approaches tested by the project is a supported employment model, which provides additional guidance and support to employees experiencing discrimination, and to their employers. In 2004, Equal Access is organising a series of seminars to consider aspects of exclusion, including ‘Opportunities for Older Workers’ which explores the measures required to support third-age employment and evaluates the success or otherwise of current initiatives to help older employees and job-seekers.
- 4.24 The *West Lothian 50+ Network* is a community-based project which started in 2001, is supported by the Lottery Community Fund, and employs a development worker. The Network’s – and therefore the Development Worker’s – objectives are to develop a wide range of learning courses, events and activities for the 50+ in areas and townships throughout West Lothian. There is a 50+ Network drop-in centre in Bathgate (the main town) which is well used and – as well as acting as the central resource – provides information, guidance and support to adults aged 50+. The Bathgate branch of the West Lothian Network has a membership approaching 300. A number of the satellite projects, although smaller, are now thriving. A recent evaluation (carried out by the SSI) shows that the Network is proving increasingly successful in expanding membership and increasing the number of satellite projects, and that members are impressed by the quality of the courses, including the pre-retirement courses. Members report that the courses and events are helping them to recover self-confidence and escape from isolation. A number have obtained employment, at least partly as a result of their involvement.

- 4.25 The projects outlined above are only a small selection of initiatives throughout Scotland aimed at involving employed, unemployed and 'inactive' older adults in lifelong learning. The benefits include helping the 50+ to obtain and retain employment.

Skills training

Ufl/learnirect

- 4.26 In 2002-2003 nearly a quarter of students following Ufl/learnirect courses were aged 50+²⁰⁸. Community-based initiatives that offer the opportunity to learn via learnirect, often prove particularly attractive to older learners. A number of these initiatives also offer guidance and other support to help people obtain employment (see paragraphs 3.74-3.77 and 4.64-4.75). Learnirect courses provide a convenient and cost-effective means of learning at work. However, many older adults – whether employed, unemployed or 'inactive' – also welcome opportunities to meet together with tutors to discuss and practise skills and explore specific issues. Learning solely at a computer can be isolating, and is often insufficient to meet individual learning needs unless time is also set aside to meet with tutors and peers²⁰⁹.

Employer Training Pilots

- 4.27 The CBI's evidence to the House of Lords Select Committee on Economic Affairs Enquiry into the Economics of an Ageing Population stated that "low skills are a barrier to the employment of people over 50"²¹⁰. The CBI's evidence to the House of Lords Enquiry identified that a third of 50-64 year olds have literacy and numeracy problems, compared with about a fifth of 26-35 year olds. The Enquiry Report observes that, "among the economically active population, 37 per cent of 50-64 year olds are not qualified to level 2 compared with 27 per cent of 20-34 year olds. Given that the number of low-skilled jobs in the economy is shrinking, this educational deficit among older workers acts as a barrier to employment²¹¹."
- 4.28 However, statistics that set out to assess the number of adults with level 2 qualifications should currently be approached with caution. Often they fail to draw a clear distinction between level 2 in basic skills, and level 2 in direct occupational skills as assessed by NVQs and other vocational qualifications. For adults aged 45+ this is especially important, because the statistics can give a very misleading impression. Many older workers have the experience and skills to undertake work well in excess of level 2 (occupational skills), and are often doing so, but they do not have the qualifications to prove their abilities. This can cause severe problems if they are unemployed and have to compete against younger – and better qualified – workers.
- 4.29 The LSC-administered Employer Training Pilots (ETPs) are a key government initiative established to address the level 2 gap within industry, in terms both of basic skills and direct occupational skills.
- 4.30 In Wales the equivalent initiative is the Learning Worker initiative, which provides free learning for full-time employees of any age up to level 3 (not level 2 as in England) and therefore leaves more opportunity for progression. However, Learning Worker is focused on individuals not employers, meaning there is no paid time off to train and therefore no wage compensation for employers²¹².
- 4.31 In Northern Ireland, the Educational Guidance Service for Adults has successfully piloted seven projects to deliver Essential Skills through the Workplace, funded through the Workplace Innovation Fund. The pilots have proved particularly successful in engaging new learners aged between 36 and 60²¹³, and have helped to provide the incentive for a

much greater focus on essential skills training for employees with low levels of literacy and numeracy. The Department for Employment and Learning's 'Essential Skills for Living' strategy includes learning in the workplace as a principal objective²¹⁴.

- 4.32 In England, six pilot ETPs were established in 2002, and were increased to 12 in 2003. From September 2004 there will be 18 ETPs covering a third of England. ETPs provide: free training for employees without basic skills and/or without a level 2 qualification or academic equivalent (five GCSEs at grade C or above); an entitlement to a minimum of paid-time off during working hours; financial support for employers to compensate them for providing time off; and free information, guidance and support for employers and employees taking part in the pilot. Individual ETPs may also provide additional benefits such training needs analyses and help in drawing up company training plans.
- 4.33 By June 2004 almost 10,000 employers and over 50,000 learners were engaged in the pilots²¹⁵. Of these, it is estimated that over a third of learners were aged 45-54 and a tenth were 55+²¹⁶. However, the evaluation of the first phase of ETPs found that ETP training and guidance staff were encountering greater difficulty in attracting older employees into learning²¹⁷, thus suggesting there was an initial attitudinal barrier among many older employees and (a point confirmed by the Evaluation Report) a considerable need for high-quality guidance within each of the ETP areas.
- 4.34 A main objective of the ETPs is to evaluate whether employers can be encouraged to train employees if they are subsidised to do so. As important is the issue of whether they will continue to do so where there is no employer subsidy: for example, if the ETPs cease, or where employees may wish to continue training to higher levels after they have achieved level 2 but cannot afford to do so without employer help.
- 4.35 The issue of progression is a key one, and affects all age groups including older workers. Previous experience of TU-WEA 'Return to Learn' and similar courses shows that many employees, including older employees, become highly motivated to learn as a direct consequence of their new experience of learning, but cannot afford to progress their learning beyond the basic level²¹⁸.
- 4.36 Progression could prove a priority issue for the Skills Strategy as the Government's current drive to raise the skills of all workers to level 2 begins to impact on overall qualification levels. It remains to be seen whether the voluntary principle is sufficient to increase and update the overall skill levels of the whole national workforce, irrespective of age, or whether some form of compulsory industrial levy (as existed before the demise of the Industrial Training Boards) may become inevitable.

Trade unions and TUC Learning Services

- 4.37 The TUC and individual trade unions have long fought for better training provision for their members, and have been prominent partners with government and employers in helping to spearhead current learning developments²¹⁹.
- 4.38 Trade unions have negotiated and worked with management to develop Learning Centres and Employee Development Schemes in companies across the UK. One of the best known initiatives is the Ford Employee Development and Assistance Programme (EDAP), which helped to pioneer in the UK the concept of paying for employees to learn, whether or not they choose vocational or non-vocational courses. Employees may therefore study such subjects as languages, car mechanics and cookery as well as more apparently vocationally-

²⁰⁸ House of Lords (2004). *Select Committee on Economic Affairs: 2nd Report of Session 2003-04: Government Response to Aspects of an Ageing Population: Report*. London: The Stationery Office.

²⁰⁹ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Full report and Appendices 1-7. Sheffield: DFES.

²¹⁰ House of Lords (2003). *Session 2002-03 (4th Report): Select Committee on Economic Affairs: Aspects of the Economics of an Ageing Population: Volume 1 - Report*, page 26, paragraph 5.10. London: The Stationery Office.

²¹¹ *Ibid*, page 26, paragraph 5.10.

²¹² Clough, B. & Moriarty, M (2004). *Time Off to Train: Union Involvement in the Employer Training and Learning Worker Pilots*. London: TUC.

²¹³ Hunt, J. & Hawthorn, R. (2003). *Tackling Essential Skills in the Workplace: an Evaluation of Projects Funded by the Workplace Innovation Fund*. Belfast: EGSA.

²¹⁴ Department for Employment and Learning (2004). *Strategic Plan 2004-2007: Promoting Learning, Preparing People for Work, Supporting Business and Economic Development*, page 16. Belfast: DELNI.

²¹⁵ Balls, E (2004). *The Skills Challenge: Forging a New Consensus*. Speech by Ed Balls, Chief Economic Adviser to the Treasury, to the Learning and Skills Development Agency Summer Conference 2004, London. London: LSDA.

²¹⁶ House of Lords, Select Committee on Economic Affairs (2004). *Second Report of Session 2003-04. Government Response to Aspects of the Economics of an Ageing Population: Report*, page 15, 11.14. London: The Stationery Office. However, it should be noted that the figures in this report are based on a smaller number of participating employers and employees than the number cited by Ed Balls for the Treasury.

²¹⁷ Hillage, J. & Mitchell, H. (2003). *Employer Training Pilots: First Year Evaluation Report* (for the Institute for Employment Studies). Sheffield: DFES.

²¹⁸ Ford, G. & Jackson, H. (1999). *The WEA and Partnerships*. London: WEA, the National Association.

²¹⁹ Ford, G. & Watts A.G. (1998). *Trade Unions and Lifelong Guidance*. Cambridge: NICEC.

oriented subject areas such as IT. Ford and other companies that have adopted this approach, see substantial dividends in creating a more motivated, self-confident, flexible and productive workforce who want to train and learn²²⁰. Older workers at Ford, including older manual workers, have participated in the EDAP project, and have continued to participate after they have retired. Equivalent schemes in other companies have seen a similar interest from older workers, and some have opened up their learning centres to whole families.

- 4.39 UNISON was the first of a number of Unions that worked with the WEA to run the successful 'Return to Learn' programme. 'Return to Learn' has attracted a large number of students back into learning, many of whom are 40+. UNISON also developed a programme to train ex-learners as Voluntary Education Advisers to support current learners. This was a forerunner of the Union Learning Representative initiative²²¹ (see paragraphs 3.85-3.89).
- 4.40 The launch of the University for Industry and the creation of Ufi/learn direct hubs have provided the incentive for the establishment of many more company learning centres. Union involvement in planning and management helps to ensure that the learning centres are not seen, either by management or employees, as the preserve of senior staff and those on 'fast stream' programmes, but are open to all employees, regardless of age and seniority.
- 4.41 Trade unions have worked with Ufi to establish the Trade Union Hub to advise, support and connect learning centres. The Hub is managed by TUC Learning Services and supports many of the learning centres established through the government's Union Learning Fund, which in their turn may support 'kiosks' and other workplace learning venues²²².
- 4.42 A number of unions organise their own learning centres for members, in association with management and employers. Examples in industries where there are sizeable numbers of older employees include the print union GPMU in Manchester, the Fire Brigades Union in Morpeth, the Public and Commercial Services Union in London, and Ucat (construction) in Canary Wharf²²³.
- 4.43 The TUC and Ufi are working together on the Building Opportunities for Workplace Learning (BOWL) project, which is developing and piloting a number of on-line tools to assist and support learners, including those with basic skills needs²²⁴. One of these, the Exploratory Gateway, will use a variety of diagnostic and information packages to help learners identify suitable programmes of learning. The packages include:
- (i) Workskills – a work-based information resource, which includes areas dealing with career progression, career change, and self-employment; and helps users to investigate skill requirements for each career move.
 - (ii) a Skills for Life screener – which helps learners to identify possible basic skills needs.
 - (iii) a learn direct tour – to introduce students to the range of learn direct courses and to the national learning database.
 - (iv) 'What do I want to learn?' – which helps students investigate their motivation to learn.
 - (v) 'Qualifications' – which introduces students to some of the qualifications available.
- 4.44 These tools can be used by adult learners from all ages in association with guidance workers and mentors, and a training programme is being developed to train guidance

workers in their usage.

- 4.45 TUC Learning Services are making important contributions to the Employer Training and Learning Worker Pilots, although only 17% of learners who have joined the pilots are union members²²⁵. The Pilots are aimed specifically at SMEs; union membership is generally much higher in larger workplaces. This means there is considerable disparity between areas, with union involvement higher in areas such as Derbyshire, Greater Manchester and Tyne and Wear, where there is more concentrated union membership. Main contributions from Learning Services include attracting and signing up new employers and encouraging employees to learn, with the encouragement and support of ULRs.
- 4.46 Evaluation of the Union Learning Fund suggests that two-thirds of the learners are aged 41-60²²⁶, although there are difficulties in collating a precise figure because of the dispersed nature of provision and the numbers of partners and providers involved. Trade unions have particular concerns about: the large number of older employees who have high levels of skills and experience but do not have the qualifications to prove this; the continuing need for high-quality ESOL provision and the numbers of older women and men from ethnic minorities whose employability remains low because of continuing difficulties with English; and further learning progression for older employees after they achieve level 2. Level 2 is often an insufficiently high level of qualification to recognise and accredit the actual (as distinct from accredited) skills and experience of older workers, or to develop their previously unrecognised potential – held back by factors that may include lack of opportunity, personal circumstances, and the previous failure of employers and management to discover that potential and encourage it.
- 4.47 The TUC is planning to establish a Union Academy²²⁷ (a collective brand-name for all its learning initiatives) for its members in England and Wales. A main objective will be to develop opportunities for members of all ages to progress to levels of achievement that more properly accord with their potential – the 'skills escalator' inclusive of degrees, vocational qualifications and continuing professional development. The Scottish TUC is planning a similar initiative.

Mature Apprenticeships

- 4.48 The Skills Strategy White Paper (2003) contains the firm proposal that the Government will "lift the age cap" on Modern Apprenticeships so that "more older learners can participate"²²⁸. To date the proposal still awaits implementation, at least partly because the difficulties in deciding a funding regime. Modern Apprenticeships remain focused on young people, rather than being open to all ages. This suggests a possible lack of joined-up thinking within government about what commitment to lifelong learning may actually mean in practice.
- 4.49 Although training initiatives targeted at mature adults remain few in number, they have invariably been successful. In 2001, BMW in the West Midlands introduced a successful two-year mature apprenticeship scheme to train older men and women as technicians, and there were no drop-outs²²⁹. In contrast, loss of young people from the national Modern Apprenticeship scheme currently averages 40%²³⁰. Semta (the Science, Engineering and Manufacturing Technologies Alliance), which was closely involved in the BMW initiative, has also supported or administered other training schemes for mature adults and found that there is practically no drop-out²³¹. Older adults often prove to be enthusiastic learners. Other employer-led training schemes – for example, to train mature unemployed people for

²²⁰ Whitehall College (2004). *Employee Development Schemes*. Bishops Stortford: Whitehall College.

²²¹ Ford, G. & Watts A.G. (1998). *Trade Unions and Lifelong Guidance*. Cambridge: NICEC.

²²² Clough, B. (2004). *TUC Logging onto Learning: the Union Contribution to learn direct Centres in the Trade Union Hub*. London: TUC.

²²³ *Ibid.*; there are other examples of TU-managed or supported learning centres throughout this report.

²²⁴ Christopoulos, M. (2004). Bowling for Ufi. *TUC Equal News*, June.

²²⁵ Clough, B. & Moriarty, M. (2004). *Time Off to Train: Union Involvement in the Employer Training and Learning Worker Pilots*. London: TUC.

²²⁶ House of Lords, Select Committee on Economic Affairs (2004). *Second Report of Session 2003-04. Government Response to Aspects of the Economics of an Ageing Population: Report*, page 15, 11.14. London: the Stationery Office.

²²⁷ Trade Union Congress (2004). *The Union Academy: a New Step Forward for Learning*. London: TUC.

²²⁸ Department for Education and Skills (2003). *21st Century Skills: Realising Our Potential: Individuals, Employers, Nation*, page 23, paragraph 1.16f, and page 25, 1.23a. Sheffield: DFES.

²²⁹ Carnell, I. (2004). Opinion. *Guardian Education Supplement*, 18 June.

²³⁰ *Ibid.*

²³¹ *Ibid.*

call-centre work in the North East and East Midlands, and for customer relations positions in the retail industry – have met with similar success.

- 4.50 Given industry's need for highly skilled and reliable employees, it would seem a priority that Government should launch properly-funded Mature Apprenticeships within the immediate future, and take every opportunity to ensure that older adults are given practical opportunities to upskill. Many older adults want the opportunity to do so. A recent initiative by Leeds College of Technology to train mature learners in plumbing skills led to some 400 older adults queuing for approximately 35 places. This also suggests that numbers of older adults may be prepared to pay – where they have the means to do so, and where there is a guarantee of employment and financial reward after training so that they can pay off their debt. However, for many older adults, this is not the case. Full utilisation of their skills and potential, in the interests of the national economy, is only likely to be possible with government investment.

Private training providers

- 4.51 There are an increasing range of private training providers who deliver training to industry, often specialising in specific occupational and sector areas. At present most of these are providing training services at management and professional level in response to industrial demand, but many of these could extend their training to cover the whole workforce if the demand was there.
- 4.52 There are also many private training providers who play a prominent role in local community and government-funded provision, delivering training to all adult age groups according to local need. Many of these are members of, or closely associated with, local IAG Partnerships and therefore able to respond more extensively to the learning needs of older adults, where and if third-age learning is identified as a local priority.

Flexible training methods

- 4.53 Initiatives such as the Employer Training Pilots and TUC Learning Services are encouraging increasing numbers of further education colleges and other learning providers working with industry, to develop more flexible methods of delivering learning to the workplace. Initiatives tailored to the needs of employers and employees that may combine e-learning, video-conferencing, off-the-shelf and bespoke learning materials and courses, e-mail and other distance contact with tutors, are becoming increasingly common.
- 4.54 A significant number of these initiatives are directed at smaller companies including those in remote locations, such as the Scottish Highlands and Islands, and are therefore likely to include a higher-than-average third-age workforce. Tutors working with companies in these locations often find that older learners on flexible learning programmes appreciate the flexibility but welcome regular group and individual sessions, where they can meet the tutors face-to-face and discuss personal learning issues and problems. A number of providers have adapted the arrangements to accommodate shift systems and other working practices in order to work with learners.
- 4.55 Because of their convenience for employers and many employees, flexible training methods are likely to become increasingly important in training and upskilling all sectors of the workforce, including older workers.

Self-employment

- 4.56 During the 12 months from October 2002 to September 2003, self-employment in the UK increased by 282,000 – a rise of 8.9%²³². The largest increases in self-employment were

in the older age groups. The number of self-employed men aged 35-49 working full-time increased by 86,000, and those aged 50-64 by 30,000. Self-employed men aged 50-64 working part-time increased by 21,000 and men aged 65+ by 9,000. Similarly, the number of self-employed women aged 50-64 working full-time increased by 17,000, and part-time aged 35-49 by 18,000²³³.

- 4.57 Main areas of self-employment for all age groups include business (real estate and renting), financial and management consultancy, construction, public administration, education and health²³⁴. This indicates that the majority of older people who become self-employed have well-developed professional or practical skills, and are likely to have access to reasonable financial and capital resources. Self-employment may not therefore be a viable option for the large numbers of those older adults displaced from manual occupations in traditional industries, unless they already have, or can acquire, saleable skills and the necessary finance.
- 4.58 Throughout the UK there are a number of agencies that specialise in advising and providing support to people who wish to become self-employed and develop their own businesses. A number of these organise training courses in aspects of business start-up and provide business mentors (often older adults with extensive business experience) to support new businesses on a one-to-one basis. The Prime Initiative, which owes its origins to the Prince's Trust, specialises entirely in helping people aged 50+ to set up in business and will provide loans if these cannot be obtained elsewhere. InBiz is an example of a national commercial training organisation that provides practical tailored support and training to individuals, many of whom are 45+, who are starting up in business. A high proportion of InBiz's training activities are undertaken for Government agencies, including Jobcentre Plus (New Deal and Work Based Learning) and Business Link, and are therefore free for eligible clients.
- 4.59 Business Link arranges a wide range of training programmes for individuals wishing to start and develop their own businesses, and is a main partner in the Employer Training Pilots and the restructured Information, Advice and Guidance Partnerships. Its well-designed website offers a wide range of information and advice to individuals considering business start-up, and to new businesses that wish to become established and grow.

Jobcentre Plus training programmes

- 4.60 Jobcentre Plus training programmes for older adults are outlined in Section 3 of this report (paragraphs 3.2-3.17) because they are integral to Jobcentre Plus's overall information, advice and guidance responsibilities. However, forthcoming developments, including greater collaboration with local LSCs in planning and financing key elements of local learning provision²³⁵, mean that Jobcentre Plus's significance as a main provider of training for the unemployed is likely to increase.
- 4.61 In many areas, Jobcentre Plus is already the main provider of work-oriented training. This helps to explain the frustration experienced by many older, and often less well qualified, adults who cannot obtain employment and are waiting to complete the six month period of unemployment before they are eligible for Jobcentre Plus training programmes. In effect, the frustrations experienced by people aged 45+ tend to reflect the overall paucity, and indeed absence, in many areas of alternative training programmes that are sufficiently related to opportunities in local labour markets. There is a pressing need in each LLSC area to map the supply and cost of learning opportunities, including occupational skills training, and identify the gaps.

²³² Macauley, C. (2003). Changes in self-employment in the UK: 2002 to 2003. *Labour Market Trends*, December.

²³³ *Ibid.*, page 625.

²³⁴ *Ibid.*, pages 626-627.

²³⁵ National Employment Panel (2004). *Welfare to Workforce Development*. London: NEP.

- 4.62 Older adults are often acutely aware of time gradually running out as they seek suitable jobs and personal fulfilment; and the long waiting period can destroy confidence and self-esteem, and ultimate employability. This means that the first stages of Jobcentre Plus training programmes often have to be weighted more heavily towards the restoration of self-esteem than towards direct occupational training and experience. The six-month waiting period is also the time when considerable numbers of older adults, who wanted to work when they were first made redundant and were fit to do so, tend to drop out or move on to incapacity benefit.
- 4.63 Government's justification for the continuation of the six-month eligibility period is that the majority of Jobcentre Plus clients tend to obtain employment within six months. However, research shows that there is considerable disparity between age groups. Older claimants normally claim benefit for longer periods than younger claimants, and this applies both to those claiming Jobseekers Allowance (JSA) and 'inactive' benefits²³⁶. Currently, 40% of JSA customers aged 50+ have been unemployed for a year or more, compared with 21% of those aged 16-49. 84% of sickness and disability benefit ('inactive') claimants aged 50-64 have been claiming for over a year, compared with 66% of the 18-49 age group²³⁷. Older adults are much more likely to be 'inactive' than 'unemployed'. On present figures, 30% of adults aged 50+ are 'inactive', compared with 2.5% unemployed. The percentage of inactive 50+ has remained constant despite the fall in unemployment, and for men aged 60-64 the figure has increased from 47% to 49%.²³⁸
- 4.64 These figures indicate how important it is for Jobcentre Plus to be able to offer older adults 'at risk' places on training and work programmes well before the six-month period has elapsed, and before the onset of sickness which is often at least partly attributable to inactivity and loss of morale. The vast majority of 50+ claimants who are unemployed are most unlikely to be able to afford alternative forms of training, and many at present are wholly reliant upon the provision offered by Jobcentre Plus.

Sector Skills Development Agency and the Sector Skills Councils

- 4.65 The newly established network of Sector Skills Councils has been established with the following main objectives:
- (i) Reduce skill gaps and shortages.
 - (ii) Improve productivity, and business and public service performance.
 - (iii) Increase opportunities to develop the skills and productivity of all workers, including action on equality of opportunities.
 - (iv) Improve learning supply, including apprenticeships, higher education and national occupational standards.
- 4.66 The Sector Skills Councils, which will eventually cover all sectors of the workforce, are funded through the Sector Skills Development Agency. The SSDA underpins, supports and develops the Councils. The Agency is also responsible for promoting and undertaking a programme of research.
- 4.67 The SSDA and SSCs are therefore in a pivotal position to influence the position of older workers, and to ensure that their skills, abilities and talents are developed and fully utilised. It is imperative for the national economy, industrial sectors and the individual workers themselves that this should constitute a priority issue.

²³⁶ Moss, N. & Arrowsmith, J. (2004). *A Review of 'What Works' for Clients aged over 50*. Sheffield: Department for Work and Pensions.

²³⁷ *Ibid.*, page (iii).

²³⁸ *Ibid.*, page 6, paragraph 2.11.

- The Skills Strategy: regional and national co-ordination***
- 4.68 In England, Government has devolved responsibility for implementing important aspects of the Skills Strategy to the Regions, and there are a number of regional players²³⁹. Skills issues play a central role in the Regional Economic Strategies of the Regional Development Agencies. The LSC and the LSDA are both increasing their regional focus. The RDAs are responsible for co-ordinating the Regional Skills Partnerships with the LSC, Jobcentre Plus, the Skills for Business Network and the Small Business Service as the other key partners²⁴⁰.
- 4.69 At national level the Skills Strategy is overseen by the National Skills Alliance, which combines the Social and Economic Partnership (SEP) and the Delivery Group. The Secretaries of State for Education and Skills, and for Trade and Industry, have jointly chaired the inaugural meetings of the National Skills Alliance and the SEP. Membership of the SEP includes the CBI, TUC, Small Business Council and Ministers from the DfES, DTI, DWP and the Treasury. The SEP's terms of reference²⁴¹ are to:
- (i) Provide strategic direction to the National Skills Strategy.
 - (ii) Assess progress against agreed objectives to ensure that implementation of the Strategy achieves maximum economic and social impact.
 - (iii) Engage employers, trade unions and representative organisations in championing the Skills Strategy and implementation of the Delivery Plan.
 - (iv) Work with the delivery partners to identify and recommend practical measures to enhance the design and effectiveness of the Skills Strategy delivery systems.
 - (v) Oversee progress of Sector Skills Agreements by assessing their impact across sectors and advising on further developments to maximise the benefits.
- 4.70 The hierarchy of responsibility for the implementation and oversight of the National Skills Strategy, which extends from local area through the regional bodies and into national government, provides real opportunities for older workers and is of critical importance to the whole issue of government attitudes towards third-age learning. There is an acute need for policies and approaches to be introduced and implemented that positively include older people, and that ensure their skills, experience and potential are fully utilised and developed – to the benefit of the Strategy and economy. Some of the partners already have older adults firmly on their agenda. Others are more hesitant. The requirement now is to ensure that the needs of older workers appear as a priority on all agendas, and are therefore communicated powerfully into the higher echelons of government.

Community and voluntary provision

- 4.71 The Challenging Age research project showed that many areas have a wide range of community and voluntary learning provision serving all adult age groups, often combined with guidance activities that can vary in terms of range and quality²⁴².
- 4.72 Membership of IAG Partnerships, and the consequent obligation to acquire the matrix quality standard²⁴³ for information, advice and guidance services, have helped a considerable number of community-based projects to improve their standard of guidance delivery. Many older adults interviewed during Challenging Age valued the fact that guidance and learning staff had time to listen, and help and support them individually and where necessary over a period of time. However, many community projects have also appreciated being part of a network. This has enabled them to refer for advice and help from other members, and especially so from the guidance professionals at the centre of each partnership.

²³⁹ Balls, E. (2004). *The Skills Challenge: Forging a New Consensus*. Speech by the Chief Economic Adviser to the Treasury to the LSDA Summer Conference 2004, London. London: LSDA.

²⁴⁰ *Ibid.*, page 12.

²⁴¹ TUC Learning Services (2004). *Skills Strategy Update*, 30 July. London: TUC.

²⁴² Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups: Full Report and Annexes 1-7*. Sheffield: DfES.

²⁴³ Details of the matrix quality standard can be obtained from the Employment NTO in Leicester, tel: 0870 770 2468; website: www.matrix-quality-standards.com

- 4.73 A proportion of the community initiatives are outreach projects funded or part-funded by local FE colleges. Future Prospects in York is an example of a well-established FE-supported initiative which has assisted many older adults to learn, work and enrich their lives by generating and acting as an umbrella for a wide range of learning, guidance, counselling and mentoring projects. A high proportion of the projects are organised in outreach locations and are targeted at people who have lost out on education or suffered trauma, such as redundancy from traditional industries. Future Prospects has helped and supported many older adults, and staff have spoken at conferences and workshops about the appropriate methodology.
- 4.74 Grantham College in Lincolnshire is an example of an FE college operating a number of community-based learning centres, including [yes@thegeorge](#) which is high-street situated and attracts large numbers of older learners. 30% of total learners are over 60. IT, assertiveness and confidence building courses are particularly popular with the 45+. Grantham College has appointed a community liaison officer to work with community groups to identify their needs, including those of older age groups – many of whom are ‘hidden’ unemployed, ‘inactive’ and rurally isolated²⁴⁴.
- 4.75 There are equivalent projects in other areas of the UK, although provision is patchy and determined by such factors as the availability of enthusiastic and effective local ‘champions’ and the necessary resources.
- 4.76 Local-authority adult and community education departments operate a large number of outreach projects throughout the UK, often in partnership with other providers. Projects can attract substantial numbers of older learners, particularly where they have the mechanisms available to listen to the needs of their local communities.
- 4.77 Many LEA adult education departments, and especially those in social priority areas, operate family learning programmes. These can attract numbers of older people who want to increase their ability to help and communicate with their grandchildren. Community programmes of this type are often free to learners. However, outside the nationally-funded social priority programmes, local authorities differ considerably in terms of fees, and their willingness to offer concessions to older learners.
- 4.78 Some of the most innovative community-based projects, combining learning, volunteering, guidance and other activities and services, are to be found in social priority areas that are eligible for funding from a number of government and other sources, including ESF finance. Most of these are situated in specific communities or targeted at particular groups. In the City of Sunderland, for example, there are community learning initiatives in the voluntary sector that:
- Employ tutorial staff who identify other community members with teaching potential, provide them with the necessary experience, encourage them to gain adult education qualifications through further and higher education, and then re-employ them or help them to gain adult teaching posts elsewhere, simultaneously multiplying the City’s supply of teaching skills while creating a learning community.
 - Involve older adults as mentors to younger learners.
 - Initiate a range of volunteering projects to serve the local community, while simultaneously creating voluntary work opportunities for local people that restore their confidence, motivate them to learn, and help them to re-enter paid work.

²⁴⁴ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*, pages 55-56. Sheffield: DfES.

- Identify older adults who can act as ‘learning champions’ to attract and support their peers.
 - Visit and support members of the community in their homes to encourage them to learn and provide them with the necessary support to do so. The majority of those visited are older men who have been made redundant after years in the same traditional industry, and have lost so much confidence as a result that they are reluctant and ashamed to leave their homes.²⁴⁵
- 4.79 A main feature of these initiatives is that they are inter-generational and attract large numbers of older adults. Although it has proved easier to involve older women, some of the projects are increasingly successful in attracting older men, often via the local ‘grapevine’ and through the identification of significant peers. A limitation of ESF funding, however, can be the imposition of upper age limits for clients receiving help from ESF-funded schemes in order to ensure they remain focused on people of ‘working age’, as defined by EC criteria.
- 4.80 A number of the Sunderland projects work closely with the WEA. The WEA has been successful throughout the UK in establishing creative partnerships with voluntary and community organisations, and by introducing a wide variety of innovative courses including family learning and training people in skills for volunteering, which have attracted older learners²⁴⁶. A particular strength of the WEA is its stress on consulting people and communities about their learning requirements, and involving learners in administration and delivery. Partially as a consequence, at least half of WEA students are 50+.
- 4.81 Age Concern is active throughout the UK in initiating and administering local learning projects for older adults. In a number of areas, local branches of Age Concern run mobile learning resources and organise transport (for example, in Northamptonshire²⁴⁷). Nationally, there are a wide range of local learning projects organised under the umbrella of the Ageing Well UK campaign, aimed to promote healthy living and in which Age Concern is a major partner. In Tyneside, Age Concern is working closely with Jobcentre Plus to reach out to ‘inactive’ adults and attract them back into learning and the labour market (the Over-50s Outreach Project - see paragraph 3.5 (viii)). Age Concern’s website and information sheets²⁴⁸ do much to inform older adults about work and learning in later life, and are straightforward and readable in presentation.
- 4.82 The University of the Third Age (U3A) is a voluntary learning organisation specifically for people aged 50+, but aimed principally at those who have retired from paid work. U3A is particularly successful at developing local learning communities, especially among those with professional and management experience. Courses are led by members with relevant experience.
- 4.83 In the mid-1990s, U3A tried to introduce a ‘spin-off’ learning movement entitled ‘Hobby House’ aimed at enabling older people with practical and craft skills to pass on and share their skills with others in their community²⁴⁹. Unfortunately, the Hobby House concept failed because the necessary resources proved too expensive. In some areas (for example, in Hartlepool), the WEA is hoping to establish equivalent practical learning groups led by, and involving, older members of the community. If a small number of ‘Hobby House-

²⁴⁵ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups: Annex 5*. Sheffield: DfES.

²⁴⁶ Ford, G. & Jackson, J. (1999). *The WEA and Partnerships*. London: WEA, the National Association.

²⁴⁷ Ford, G. & Soulsby, J. (2000). *Northamptonshire Third Age Employment and Learning Project: Recommendations to Develop Services and Arrangements to Help Older People Maximise their Employability and Potential for Personal Growth in Northamptonshire*. Leicester: NIACE.

²⁴⁸ Examples of helpful Age Concern information sheets include: *Older Workers* (February 2004); and *Leisure and Learning* (June 2004).

²⁴⁹ Ford, G. (1996). *Career Guidance in the Third Age: a Mapping Exercise*, page 24. NICEC Project Report. Cambridge: CRAC.

type' projects can be established to pilot the concept, this could prove an excellent method of involving older people (many with little previous experience of learning) in learning activities, while helping them to develop practical and educational skills of value to their communities.

- 4.84 A number of charitable organisations that employ volunteers provide high-quality training programmes to prepare people for volunteering. Examples include Citizens' Advice Bureaux, Relate and the Samaritans. However, some charities impose an upper age limit on the age of volunteers, and therefore on entry to their training programmes. In some cases the age caps may be attributable, at least in part, to the terms of insurance. This is an area of apparent age discrimination requiring more detailed research and attention. Voluntary Service Overseas has recently lifted the upper age limit for volunteering, and recruits and trains suitably experienced volunteers up to the age of 75. 20% of its volunteers are over 50.
- 4.85 Specialist third-age guidance projects are considered in paragraphs 3.74-3.77. Most, if not all, combine opportunities for learning.
- 4.86 The LSC has recognised the importance of the voluntary and community sector in helping it to meet its targets, especially in respect of widening participation. The LSC's policy document – *Working Together* – sets out a strategy for greater collaboration between the LSC and the voluntary and community sector (VCS), and is a timely and important publication. It identifies the sector's achievements in a number of areas, including its success in involving minority ethnic groups in learning, and in designing and implementing programmes that enable people to progress from community learning into volunteering and return to the formal labour market²⁵⁰. However, although the document cites the LSC's remit to realise key areas of the National Skills Strategy as a main reason for increased LSC-VCS collaboration, there is no specific reference in *Working Together* to the pressing need to increase the participation of older adults in learning and equip them to contribute to the Skills Strategy, both in the paid labour market and in the voluntary sector.

Concluding observations

- 4.87 This survey of learning provision for older adults contains a number of encouraging features. The separate elements show that, although there are major gaps, much of the framework for a third-age learning strategy is in place. However, a framework does not constitute a strategy, and the main missing element is the strategy itself. Successive government strategy documents in England – and in particular, the *21st Century Skills* White Paper – omit any reference to skills training for people aged 50+. All too often the policy documents fail to recognise, or even refer to, the importance of third-age learning, and to the key role older adults can play, and should be playing, in contributing to the National Skills Strategy and resolving skill gaps. Absence of a centrally co-ordinated strategy can mean that the needs of the 50+ are overlooked or downgraded, and that policies are introduced that make it even more difficult for them to contribute – for example, moves to increase fees for vocationally-oriented courses above level 2, where costs already exclude many older adults from training and up-skilling.
- 4.88 Where training initiatives exist which are targeted or partially targeted at older adults, these are invariably successful. A main problem is that these initiatives are isolated and fragmentary. As a consequence, many older adults are virtually excluded from mainstream provision – in terms of costs, availability of provision and not being made to feel welcome. Exclusion helps to feed and confirm the negative attitudes that many 50+ living in communities without a culture that is supportive of learning, and especially men who have been made redundant from traditional manufacturing industries, already have towards learning.

- 4.89 The ultimate imperative is demographic change and the effects this will have on working practices and the national economy. 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, communities and from within government itself. This calls for a strong and concerted strategy from national government. Currently this is missing (see also Section 5).

²⁵⁰ Learning and Skills Council (2004). *Working Together*. Coventry: LSC.

5 Co-ordination: the Need for ‘Joined Up’ Thinking and Implementation

Non-governmental and voluntary agencies

- 5.1 There are a number of national organisations working on behalf of older adults who want to work, learn and contribute to the national economy and their local communities. For some of these agencies, enabling older adults to work and learn is their main objective; for others, this is part of a wider brief. A number of the organisations have been referred to already in this paper. They include (in alphabetical order):
- (i) *Age Concern*: which has been active in defining the effects of demographic changes on each region and has published a series of regional and national reports on the consequences for regional and national economies.²⁵¹
 - (ii) *Better Government for Older People*: which is a partnership of over 300 organisations concerned to engage older people in decision making and in influencing local, regional and national strategies and services for an ageing population. BGOP is a key part of the UK’s ‘Modernising Government Agenda’. Its current priorities are: employment; regeneration and neighbourhood renewal; lifelong learning; health and social care; race and age diversity; and the World Assembly on Ageing Action Plan. Inevitably individual members differ in the weight they place on specific priorities, to accord with their interpretation of the local needs of older people in their area.
 - (iii) *Employers’ Forum on Age*: which is a network of employers that researches and promotes the business benefits of employing an age diverse workforce. Some of its publications, for example the Policy Review Toolkit²⁵² which helps employers to assess their own age-diversity policies, are important aids for guidance workers in advocating the value of employing an age-diverse workforce to local companies.
 - (iv) *Health Development Agency* (see paragraph 3.96).
 - (v) *Help the Aged*: which is the principal sponsor of the Third Age Employment Network and – with Age Concern – a sponsor of the PRIME initiative which helps people aged 50+ to set up in business.
 - (vi) *Joseph Rowntree Foundation* – through the ‘Transitions after 50’ programme²⁵³ which to date has produced ten research reports on aspects of ageing including early retirement and its effect on income in later life, the experiences and expectations of people leaving paid work after 50, nurses over 50, and the financial circumstances of early retirement.
 - (vii) *NIACE Older and Bolder Project* (see paragraph 3.73).
 - (viii) *Third Age Employment Network*: which is a network of over 250 organisations working to provide older adults with the choice of continuing to work, by influencing government policies at all levels and changing employer and public attitudes and stereotypes. It produces briefings, newsletters and other publications which provide valuable background information for learning and guidance providers, and for older adults. TAEN was responsible for managing the DfES-funded Challenging Age research project on information, advice and guidance for

older adults (see footnote 2). The LSC financed the dissemination programme, which included the production of a CD of training resources for managers and front-line workers and a series of regional roadshows to promote the findings and resources. Challenging Age has proved influential in influencing the quality and extent of third-age guidance delivered through a range of local and national provider agencies.

- 5.2 A particular feature of the work of these organisations has been their success in networking a wide range of bodies that: recognise the huge impact that demographic change is having, and will continue to have, on national economies and local communities; and are united in their desire that older adults should have the opportunity and choice to continue to use and develop their skills and experience to the benefit of themselves, the economy and their communities. The network nature of the organisations means that they are able to listen to the grassroots requirements of older adults – including learning and guidance requirements – and convey these to government and other influential bodies.
- 5.3 A number of university research departments specialise in research into aspects of growing older, including work and learning issues. These include: the Centre for Research into the Older Workforce (CROW) at the University of Surrey which works in partnership with NIACE and the Pre-Retirement Association²⁵⁴; Sheffield Hallam University²⁵⁵; and the Department of Sociological Studies at the University of Sheffield which – with other work on older adults – has managed the Economic and Social Research Council Growing Older programme²⁵⁶. This and other research from the university sector provides important data informing national policy towards older adults. The challenge is to ensure that the research supports and encourages those in government who want to introduce strategies that facilitate the proactive involvement of greater numbers of older adults in the economy, in the community and in learning, and therefore balances the current national focus on the largely reactive issues of pensions and care.

Government

- 5.4 A number of 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 coordinated national strategy.
- 5.5 The *Department for Work and Pensions’ Age Diversity and Over 50s Strategy Team* is: helping employers to prepare for age legislation; encouraging employers to train and retain employees aged 50+; and collating case studies of employer good practice which are posted on the informative Age Positive website. The Team has commissioned and published a number of important research reports on such areas as the labour market participation of older workers²⁵⁷, flexible retirement²⁵⁸, the recruitment and retention of older workers²⁵⁹, and working after state pension age²⁶⁰. DWP also played a main role (in liaison with HM Treasury and the Inland Revenue) in producing one of the few government reports that offers practical proposals on methods of extending opportunities for older workers, entitled *Simplicity, Security and Choice*²⁶¹. The extensive range of programmes and initiatives undertaken by Jobcentre Plus is outlined in paragraph 3.3.
- 5.6 *The Department for Education and Skills* has financed the influential Challenging Age research project on information, advice and guidance for older age groups, and the

²⁵¹ An important example is: *The Economy and Older People*: Policy Unit, Age Concern England (2004).

²⁵² Employers Forum on Age (2003). *EFA Policy Review Toolkit – One Step Ahead*. London: EFA.

²⁵³ Hirsch, D. (2003). *Crossroads after 50: Improving Choices in Work and Retirement*. York: Joseph Rowntree Foundation.

²⁵⁴ An example of the work being produced by the Centre for Research into the Workforce at the University of Surrey is: McNair, S., Humphreys, C., Woodfield, S. & Owen, L. (2003). *Changing Work in Later Life: Setting an Agenda*. Guildford: University of Surrey.

²⁵⁵ Sheffield Hallam University has produced a number of influential reports including: Beatty, S., Fothergill, S., Gore, A. & Herrington, A. (1997). *The Real Level of Unemployment*. Sheffield: Sheffield Hallam University. Also Beatty, C. & Fothergill, S. (2002). *Moving Older People into Jobs: Jobcentre Plus, New Deal and the Job Shortfall for the Over 50s*. London, Third Age Employment Network.

²⁵⁶ Dean, M. (2004). *Growing Older in the 21st Century*. Swindon: Economic and Social Research Council.

²⁵⁷ Humphrey, A., Costigan, P., Pickering, K., Stratford, N. & Barnes, M. (2003). *Factors Affecting the Labour Market Participation of Older Workers*. Sheffield: DWP.

²⁵⁸ Department for Work and Pensions (2002). *Flexible Retirement: a Snapshot of Large Employers’ Initiatives*. Sheffield: DWP.

²⁵⁹ Department for Work and Pensions (2002). *Good Practice in Recruitment and Retention of Older Workers*. Sheffield: DWP.

²⁶⁰ McKay, S. & Smeaton, D. (2003). *Working after State Pension Age*. Sheffield: DWP.

²⁶¹ Department for Work and Pensions (2002). *Simplicity, Security and Choice: Working and Saving for Retirement*. Sheffield: DWP.

extensive dissemination was funded by the LSC (paragraph 5.1 (viii)). For a period the *Learning and Skills Council* designated older adults at risk of unemployment as a priority group for IAG services. There may still be scope for local LSCs to identify older adults as a priority group, but under the new specifications this may apply only to those older adults without Level 2 qualifications. There are important issues here that will need to be considered by the new LSC Equality and Diversity Committee, the local IAG Boards, the Regional Skills Partnerships, and the National Skills Alliance (see paragraph 4.69).

- 5.7 DfES has set up a working group in Summer 2004 to review access to student loans for adults aged 54+; under current legislation older people are ineligible from this age (see paragraph 5.15). This is in response to campaigning within the House of Lords. DfES is also responding to continued criticism about the absence of reference to older workers within the skills strategy by inaugurating a review of access by older adults to work-related training and informal learning. These are fundamentally important reviews, as paragraphs 5.9-5.29 of this report make clear.
- 5.8 In 2000 the Cabinet Office Performance and Innovation Unit (now the *Strategy Unit*) produced the *Winning the Generation Game* report on improving opportunities for people aged 50-65 in work and community activity.²⁶² This influential and comprehensive report concentrated on employment, retention, action to improve job skills training, and volunteering. Its many recommendations included that:

- “the potential significance of the new Adult Information, Advice and Guidance Initiative for older people should be recognised and they should be targeted as a priority group”²⁶³;
- action should be taken to engage the 50+ in lifelong learning, and “the Learning and Skills Council should consider the needs of older adults as part of its overall strategy”²⁶⁴;
- job skills training should be improved and opened up to older inactive adults not claiming Job Seekers Allowance (e.g. the 50+ claiming disability benefits)²⁶⁵.

Many, but not all, of the recommendations in this Report have been implemented. However, some – including those relating to guidance, and the involvement of many more adults aged 50+ in lifelong learning – are now at risk where older individuals have Level 2 qualifications and above, but have limited finances to pay for learning or guidance.

A national third-age strategy?

- 5.9 In November 2003 the *House of Lords* published a Report of the Select Committee on Economic Affairs, *Aspects of the Economics of an Ageing Population*²⁶⁶, which contains some important and highly relevant recommendations, including that the Government:

- (i) “.... incorporate explicit targets with respect to older age employment in their Regional Economic Strategies and in the priorities they set for Regional Development Agencies”²⁶⁷. (The work of Christina Beatty and Stephen Fothergill at Sheffield Hallam University has shown that older adults in particular are affected in areas where there are persistently high levels of unemployment because of the closure of large-scale, and often traditional, industries such as coalmining, steel, and ship-building²⁶⁸);
- (ii) “.... commission further research and analysis into economic inactivity among

persons aged 50+, in order to produce a clear basis of evidence on which to build policies to promote higher rates of labour force participation among older persons”²⁶⁹;

- (iii) “.... in liaison with employer and labour organisations collect information and disseminate ‘best practice’ guidelines on ways in which jobs and workplaces can be redesigned to facilitate the employment of older workers who have activity-limiting health status”; and “we further recommend that employers should actively evaluate and instigate the redesign of job tasks and workplaces in order to maximise the opportunity for retention and recruitment of older workers”²⁷⁰;
 - (iv) works together with employers “.... to develop mechanisms to promote equal access to workplace training and lifelong learning for workers regardless of age”²⁷¹;
 - (v) “.... commission research on the relationship between individual age and worker productivity in order to provide a sound foundation for evidence-based policy. We believe it is essential to improve knowledge of the relationship between individual age and worker productivity in order to provide a sound foundation for evidence-based policy”²⁷²;
 - (vi) “.... in co-operation with the Financial Services Authority take action to facilitate the provision of financial advice by employers and make clear the basis on which employers may provide advice, without lowering standards”²⁷³; and “.... explore with the voluntary sector and the financial services industry the possibility of developing a national financial advice network for low-paid individuals”²⁷⁴ (the *Challenging Age* report also underlines that financial advice is integral to effective third age guidance on learning and work²⁷⁵).
- 5.10 The same report describes the “restriction of student loans to people below the age of 54” as “blatant discrimination.” The DfES “should explain why age discrimination exists in the provision of student loans”²⁷⁶.
- 5.11 This is a critically important, prescient and wide-ranging report that recognises acutely the economic importance of enabling many more older adults to participate actively in the labour market, and contains important and far-reaching proposals to enable them to do so. For example, it is rare to find so explicit a recognition of the need for much greater attention to ergonomic factors in the workplace, so that older employees can continue to maximise their contributions and productivity, and remain in work. Throughout the Report, the House of Lords rightful concern about the financial situation of older adults, and its impact on the economy, is balanced with the objective of making much better use of the skills, potential and experience of many more adults aged 50+ in order to maintain and increase productivity.
- 5.12 The Government’s response (published 5 July 2004)²⁷⁷ is arguably the most comprehensive outline of government policies across departments yet available. It is therefore a most useful report. However, it lacks the vision and driving sense of purpose so apparent in the House of Lords document, because it has to reflect the current – and narrower – preoccupations of the Government in relation to older adults.

²⁶⁹ House of Lords Select Committee on Economic Affairs (2003). *Aspects of an Ageing Population, Volume 1 – Report*, pages 23-24, paragraph 4.47. London: The Stationery Office.

²⁷⁰ *Ibid*, page 25, paragraphs 5.7- 5.8.

²⁷¹ *Ibid*, page 27, paragraph 5.17.

²⁷² *Ibid*, pages 27-28, paragraph 5.16.

²⁷³ *Ibid*, page 41, paragraph 9.20.

²⁷⁴ *Ibid*, page 44, paragraph 9.38.

²⁷⁵ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*, page 36, paragraph 2.4 of the full Report, and Appendices 1-7. Sheffield: DfES.

²⁷⁶ *Ibid*, page 35, paragraphs 7.10 and 7.11.

²⁷⁷ House of Lords, Select Committee on Economic Affairs (2004). *Second Report of Session 2003-04. Government Response to Aspects of the Economics of an Ageing Population: Report*. London: The Stationery Office.

²⁶² Cabinet Office Performance and Innovation Unit (Strategy Unit) (2000). *Winning the Generation Game: Improving Opportunities for People aged 50-65 in Work and Community Activity*. London: the Stationery Office.

²⁶³ *Ibid*, pages 7 and 83-84.

²⁶⁴ *Ibid*, pages 65-66.

²⁶⁵ *Ibid*, pages 85-86.

²⁶⁶ House of Lords Select Committee on Economic Affairs (2003). *Aspects of an Ageing Population, Volume 1 – Report*. London: the Stationery Office.

²⁶⁷ *Ibid*, page 21, paragraph 4.7.

²⁶⁸ Beatty, C. & Fothergill, S. (2002). *Moving Older People into Jobs: Jobcentre Plus, New Deal and the Job Shortfall for the Over 50s*. London: Third Age Employment Network.

- 5.13 Considerable faith is placed in the potential impact of age legislation in 2006 to create opportunities for the 50+ and encourage retention. The setting of targets for the employment of older adults is seen as solely a regional option rather than an integral element in a national strategy. The point about the redesign of job tasks and work-places is missed, and is interpreted as a recommendation purely about health, rather than how to adjust the workplace, including working practices, so that older people can continue to maximise their contributions to the economy and community (see paragraphs 3.95-3.96 and footnote 184 on FinAge).
- 5.14 The response document is helpful in terms of the information it provides on finance, pensions and lifelong learning, including the Union Learning Fund and Employer Training Pilots which are key elements in the Government's Skills Strategy. However, it does not touch on the larger question of how to continue to engage employers, and especially SMEs, in training older employees should employers have to bear more of the cost, nor does it consider the issue of progression once employees have attained qualifications at Level 2.
- 5.15 Access to student loans from age 54 is firmly ruled out. The report explicitly links the Government's higher education policies to strategies that "improve the skills and qualifications of the workforce and so ... raise the economic performance of the UK, to the benefit of all its citizens"²⁷⁸. The clear inference is that adults aged 54+ are too old to improve their skills and qualifications, and therefore to contribute to the attainment of higher UK economic performance if there is any risk that any of the cost of their doing so may fall on the State - for example, through older adults defaulting on their student loans through retirement or death. The stipulation appears to set clear parameters on the extent to which older adults can expect to be included in the National Skills Strategy in terms of skills development and learning progression, and ensures that higher education in later life remains the preserve of those with substantial financial means (see paragraph 5.7).
- 5.16 The vision of harnessing the skills, experience and potential of older adults, which underpins the House of Lords report, dissolves in the Government's response into an exercise which is predominantly about pensions issues. The House of Lords report is about developing ways of investing in the skills of older adults so that the whole nation can profit from the additional productivity this can make possible. The response, despite its virtues, exposes the lack of collective vision in government policy. The pressing national need is for a third-age strategy which matches the vision that illuminates the House of Lords report, and which seeks to make much more extensive use of people's skills and experience irrespective of age, "to the benefit of all ... citizens"²⁷⁹. A strategy that embraces work and learning, as well as pensions and care, would clearly 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.
- Listening and responding to older adults: personalised services***
- 5.17 Neither the House of Lords Report nor the response document refer to the role of guidance in assisting, supporting and remotivating older adults. This means that neither report considers the individual consequences of economic inactivity among persons aged 50+ in any detail, and this is an important omission. For example, the findings from the Challenging Age research²⁸⁰ indicate that many adults aged 50+ who are made redundant are unable to find alternative employment and therefore lose morale and motivation, meaning that they begin to describe themselves as 'retired' and become accustomed, if not reconciled, to this situation. This common reaction to third-age unemployment is not included in the House of Commons Report's list of "potential reasons for the non-

participation of older people"²⁸¹ in the labour market.

- 5.18 In its brief analysis of potential reasons for the third age non-participation in the workforce, the House of Lords Report refers to older people who "are in receipt of an adequate income from private or public resources" and show "a preference for leisure rather than work"²⁸². Although there are undoubtedly numbers of these, the Challenging Age research found that significant numbers of those older adults who might be considered as falling into these categories, would like to work if the opportunities were there but not necessarily in the same area of employment. Guidance workers, who are in constant touch with the public, recognise that many older adults experience a natural desire for a change of occupation after years in the same employment. This desire is often linked to stress factors in the modern workplace. The wish to escape from stressful workplace conditions, if necessary through retirement, is now becoming so common that there would appear to be an increasing need for detailed research on the reasons, at least partly in order to provide a more complete rationale for third-age non-participation in the formal and paid labour market (see paragraphs 3.99-3.100).
- 5.19 If government third-age policies are genuinely to succeed, then they should relate more closely to the needs and motivations of older adults themselves. This means listening more closely to older people, and providing personalised services that offer individualised help and support while also encouraging and enabling individuals to communicate their own requirements. A main responsibility of front-line guidance workers is to listen closely to the needs of individuals and to help them overcome the barriers that prevent them from achieving their objectives. This information and experience needs to be fed back to senior policy-makers and government. In England, the local IAG Boards, LLSCs, Regional Skills Councils and National Skills Alliance can provide the necessary means of communication (see paragraphs 4.68-4.70).
- 5.20 It can be difficult for governments to appreciate that the provision of choices and options by themselves are often not enough. Many people need help and support in relating the options and choices to their own situations. In a paper published in *Prospect* (April 2004), Philip Collins argues that "choices in public services are often complex and the information may need decoding. Choices may need to be supported. Thus part of the new public service ethos will be to put the professions directly at the service of the people. If we used professional expertise, not just as the deliverer of a service, but as the assistant helping to shape the choices of citizens in their locality, we would marry the idea of the public service ethos with that of individual choice. Choice should require support networks, to help individuals navigate the system rather than paternalistically taking the decision out of their hands."²⁸³
- 5.21 Tony Watts has applied the concept of the 'personalisation' of public services to guidance. "The notion of encouraging public goods to emerge, in part, through public policy helping to shape millions of individual self-organising decisions provides a powerful rationale for the role of career guidance services. The aim of such services is to respect the right of individuals to make their own decisions in relation to their choices of learning and work, but to ensure that these decisions are well-informed and well-thought-through. In this sense, they represent a 'soft' policy instrument, in the sense that they work *through* people rather than *on* them."²⁸⁴ This means providing individualised and personal services where these are required, and enabling people of all age groups to participate in and advise on their development.
- 5.22 The point at issue is that people do not, and cannot, react to public initiatives and choices according to a set text written by government. The older people are, the more 'personal baggage' they have acquired and the more complex the decisions may be. For the 50+, their personal situation may be further complicated by conscious or unconscious age

²⁷⁸ *Ibid*, page 19.

²⁷⁹ *Ibid*, page 19.

²⁸⁰ Department for Education and Skills (2003). *Challenging Age: Information, Advice and Guidance for Older Age Groups*. Full Report and Appendices 1-7. Sheffield: DFES.

²⁸¹ House of Lords, Select Committee on Economic Affairs (2004). *Second Report of Session 2003-04. Government Response to Aspects of the Economics of an Ageing Population: Report*, page 23, paragraph 4.45. London: The Stationery Office.

²⁸² *Ibid*, page 23, paragraph 4.45.

²⁸³ Collins P. (2004). Choices for the left. *Prospect*, April, page 33.

²⁸⁴ Watts, A.G. (2004). *Personalisation: an Opportunity and Challenge for Career Guidance Services*. London: Careers England.

discrimination by employers, and within workplaces and local communities. Unless current government initiatives, and future government strategies to enable and encourage many more older adults to work and learn, are prepared to engage with people's individual situations and the myriad personal decisions these involve, there is a much higher chance that the initiatives and strategies will fail. People need to be able to relate the options and choices to their own lives.

- 5.23 Even in those departments and agencies that recognise the importance of guidance (or, in England, 'IAG'), important policy documents can appear that make no reference to guidance. For example, the LSC's Consultation Paper on fees, funding and learner support in further education²⁸⁵, states that there is a need for a 'culture change' so that people recognise that they need to contribute towards the cost of learning, but does not consider how the culture change can be effected. At no point in the Consultation Paper is there any direct reference to the potential role of guidance services – for which of course the LSC is itself responsible. The absence of any reference to the role of 'IAG' in the document suggests that, even in the LSC, any real understanding of the importance of guidance in helping the LSC to achieve its objectives, and in relating policy to individual requirements, exists only in pockets.
- 5.24 For older adults, the implications of the Consultation Paper could be considerable, because the proposals are likely to increase the cost of adult learning above level 2 even further. If people aged 45+ are to be enabled to retrain and upskill so that they continue to be employable, and therefore able to contribute to national productivity, there is an acute need for the LSC to engage through its IAG services with the many older adults concerned – whether unemployed, inactive, or in work but not in receipt of training. This point is not recognised in the Consultation Paper.
- 5.25 The absence of a coherent national strategy in England towards older adults, and the role that guidance and learning can play within that strategy, is well illustrated by the DfES White Paper, *21st Century Skills: Realising Our Potential*, which sets the scene for the Government's Skills Strategy as it applies in England²⁸⁶. The White Paper stresses the importance of creating a "strategic policy framework" and the need "to mobilise the full commitment of Government, its agencies, education and training providers, employers, unions, and individual learners" in carrying through the Skills Strategy and eradicating the skill gaps²⁸⁷. The White Paper also identifies improved information, advice and guidance services as integral to the Skills Strategy²⁸⁸.
- 5.26 However, the immense impact that demographic change can have on the nation's ability to implement the Skills Strategy is scarcely mentioned, and the learning needs of older adults are only considered in their role as 'pensioners'. This means, for example, that the persistence of skill gaps in industry at "technician, higher craft and associated professional skills at Level 3" is considered mainly in terms of training for younger age groups. There is no reference to the importance of retaining and making better use of the skills and experience of mature workers²⁸⁹. The DfES White Paper also states the government's intention to limit Adult Learning Grants at Level 3 to young people, since confirmed by the LSC Consultation Paper, *Investing in Skills*, as only being available for adults up to age 30 for full-time study²⁹⁰. Neither of the two government strategy documents refers at any stage to the realities of demographic change. The opportunity to identify lifelong learning as a key method of offsetting the more negative consequences of a rapidly ageing population is therefore completely missed.
- 5.27 The English White Paper contrasts starkly with the comparable Scottish Executive Document, *Life Through Learning – Learning Through Life*, which identifies demography as one of six "areas of change" that will "affect the provision of learning in the future" –

²⁸⁵ Learning and Skills Council (2004). *Investing in Skills: Taking Forward the Skills Strategy: an LSC Consultation Paper on Fees, Funding and Learner Support in Further Education*. Coventry: LSC.

²⁸⁶ Department of Education and Skills (2003). *21st Century Skills: Realising Our Potential: Individuals, Employers, Nation*. Sheffield: DfES.

²⁸⁷ *Ibid.*, page 12, paragraph 9.

²⁸⁸ *Ibid.*, pages 67-68, paragraphs 4.33-4.38.

²⁸⁹ *Ibid.*, pages 63-64, paragraphs 4.17-4.19.

²⁹⁰ Learning and Skills Council (2004). *Investing in Skills: Taking Forward the Skills Strategy: an LSC Consultation Paper on Fees, Funding and Learner Support in Further Education*, page 31, paragraph 4.5. Coventry: LSC.

²⁹¹ Scottish Executive (2003). *Life Through Learning – Learning Through Life*, page 5. Edinburgh: Scottish Executive

the others are economic, social justice, citizenship, skill shortages and technological.²⁹¹ The Document devotes several pages to an analysis of the demographic issues²⁹² and summarises the issues facing older adults – and therefore the whole Scottish economy – in a section which merits quotation in full, both because of its importance for the Skills Strategy in Scotland and because of its wider implications for the other countries of the UK²⁹³:

"As well as the demographic transition an additional factor in Scotland is that older workers have been disproportionately affected by unemployment compared to younger workers and to their counterparts in England or Wales. (Author's note: this statement overlooks the numbers of inactive older people in all countries of the UK who drop out of the labour market and therefore do not appear on the official unemployment figures, including those who subsequently draw disability benefits.)

"As the demographic changes continue, employers will increasingly need a workforce of all ages and with the skills of the 21st century. At the same time, many older people may wish to continue working. The UK Government's Pensions Green Paper sets out the ways they will encourage older people to remain in the workforce through their pensions, benefits and employment policies. The Performance and Innovation Unit document, 'Winning the Generation Game' (April 2000), pointed out that uneven access to lifelong learning is one of the reasons that prevents people from making a full contribution to working life as they get older. Therefore the need for access to appropriate training opportunities for older people, both for those in employment and for those seeking employment, will increase in future.

"Another potential barrier to employment is the lack of training given to older workers. Figures from the Labour Force Survey show that in 1998 only 17 per cent of employees aged 50 plus had received training in the last 13 weeks, compared with 29 per cent of those aged below 50. As older workers are generally less likely to participate in job-related training, they have higher barriers to overcome should they be confronted late in their career with the need to engage in instructor-led learning. Indeed there is now considerable evidence that older workers in the UK are less likely to receive work-related training than their younger counterparts. Ensuring that we have the supply of skills we need to match demand means that lifelong learning for all ages will be increasingly important. The UK Government is committed to do more to promote employment amongst those aged 50 and over and to tackle age discrimination. A key UK initiative in this area is the Age Positive campaign and the Code of Practice on Age Diversity in Employment."

- 5.28 These paragraphs demonstrate an awareness of the realities of demographic change, a sensitivity towards the needs of older adults, and an understanding of the immense contribution older adults can make to the national economy, which is apparent throughout the Scottish Strategy Document. For example, "older adults whose skills have become out of date" are identified as a group who have historically not participated in post-16 non-compulsory education and who require support in order to access the Scottish Executive's lifelong learning programmes²⁹⁴.
- 5.29 An equivalent approach towards older people is required in the Skills Strategies of all the countries of the UK. The policies set out in *21st Century Skills: Realising Our Potential* currently underpin the English Skills Strategy. However, there is a real risk that large numbers of the potential working population – and especially those aged 45+ who have Level 2 qualifications or who gain Level 2 as a consequence of basic skills initiatives and

²⁹² *Ibid.*, pages 14-16.

²⁹³ *Ibid.*, pages 17-18.

²⁹⁴ *Ibid.*, page 28.

then want to progress – could find themselves excluded from important strands of the Strategy, and especially those aspects designed to utilise and develop people’s potential and to train/retrain people to fill skill shortage areas.

- 5.30 In 2000, Ford & Watkins proposed the establishment of a ‘Third Age Gateway’ offering local and accessible provision for older people and deliverable through IAG Partnerships²⁹⁵. The ‘Third Age Gateway’ proposal was aimed principally at those who want to work but are debarred through ageism, outdated skills and labour market changes, and are therefore – in common with young people in the Connexions priority groups – socially excluded. The elements of the ‘Gateway’ might include:
- (i) basic information and advice services.
 - (ii) labour market and learning information tailored to the age group.
 - (iii) financial guidance.
 - (iv) assessment, including interests, skills, abilities and ‘hidden’ potential.
 - (v) in-depth guidance and support.
 - (vi) access to taster courses and planned work experience (including volunteering).
 - (vii) groupwork on career and life management skills offered as workforce development and delivered either through companies or community groups.
 - (viii) links to New Deal and other Jobcentre Plus programmes, LSC-funded learning provision, and other relevant or specialist local initiatives.
- 5.31 An important aspect of the Gateway proposal is that older adults at risk of exclusion would not have to wait for six months (as they normally do to qualify for Jobcentre Plus programmes), but would have early access so that the risk of losing confidence and motivation – and therefore employability – would be minimised.
- 5.32 NIACE has built on the ‘Third Age Gateway’ to propose a wider ranging ‘life stages’ approach to third age guidance, ‘Stage Posts’, which is based on the phase of life older people have achieved or reached, rather than their age. “This has considerable advantages – using age tends to stereotype – using stages means an 85 year old can be looking for employment whilst a 55 year old looks for a leisure opportunity. The age related concept of retirement has been eroding for some time, and is now better understood as a stage or process of transition.”²⁹⁶
- 5.33 ‘Stage Posts’ would involve a partnership of relevant organisations including education providers, guidance agencies, NHS, Jobcentre Plus, trade unions, employers, financial advisers and Citizens Advice Bureaux, which are united by their commitment to and participation in the ‘Stage Posts’ service, integrated by a common branding, and jointly marketed. In his introductory paper, Jim Soulsby observes: “... many people are hard to reach and a broad-based signposting service is more likely to reach them than disparate, short-term, isolated services. Linking advice services and education agencies helps to build personal capacity and the confidence needed to solve problems, reduce current dependency and offset future dependency”²⁹⁷.
- 5.34 Services would include the opportunity, according to individual need, for: a health check; income and pension checks; skills analysis; exploration of employment and learning options; and consideration of quality of life issues, and how to ensure a sense of purpose and gain self-fulfilment (often especially difficult after retirement, whether voluntary or involuntary). The overall objective of ‘Stage Posts’ is to ensure that older adults, according to the stage they have reached in life, have full information on the options open to them (including the possibility of paid work if they have, or are able to obtain, the necessary skills), and have the help and support many require to enable them to contribute

to their communities and lead personally productive and fulfilling lives. At present, far too many are conscious of waste, and lose self-esteem and retreat into isolation²⁹⁸.

- 5.35 The ‘Stage Posts’ proposal, and the life stages approach on which it is based, are currently being considered by Government.
- 5.36 There are distinct similarities between elements of ‘Stage Posts’ and the government’s consultation paper on the formation of a Third Age Service – Link-Age – in line with the Labour Party’s commitment in the 2001 Labour Party Manifesto²⁹⁹. A point at issue has been whether the Service should be aimed at the 50+ (and therefore presumably be linked, at least in part, to the National Skills Strategy) or whether it should be targeted only at those nearing retirement or who have retired. The proposed Link-Age service is in fact aimed at the over-60s age group, but through a network of already-established and locally-based statutory and voluntary agencies working with older people and able to respond to requests for information and advice on a joined-up and holistic basis, in line with ‘Stage Posts’.
- 5.37 Although the main focus in the consultative document is on such issues as health, safety and care (i.e. older people as *recipients* of state services), there are also encouraging references to older adults as *contributors*, for example through working as volunteers to help in the delivery of Link-Age and through continuation in work and involvement in lifelong learning after state retirement age. These aspects of the Link-Age proposals should be actively encouraged. There could be real opportunities here for providing much better co-ordinated and wider-ranging information, advice and guidance services to older age groups, and – if the proposals are successfully implemented – extending these services to the many adults aged 50+ (with no upper age limit) who require (i) the help of skilled guidance workers in order to maximise their contributions to the economy and community; and (ii) continued access to lifelong learning opportunities to re-skill, update and re-equip them for the changing labour market.
- 5.38 NIACE, through its Older and Bolder Programme, is also developing a “Curriculum for Later Life”, and the Stage Posts proposal relates very closely to this. Older adults are gradually being encouraged to stay in the workforce for longer, including beyond state pension age (although how many can do so is not clear), and to contribute to their local communities through volunteering, mentoring, citizenship (including involvement in local democracy), and environmental and inter-generational concerns.³⁰⁰ These changes are generating an urgent need for a curriculum for older adults that helps them to understand why these developments are happening, how the developments relate to them individually, and what issues this raises for local communities and the wider society. NIACE’s current research programme to determine the content of a “Curriculum for Later Life” and how it would be implemented includes: focus groups and consultations with older adults to identify their learning needs and their observations on current adult learning; a mapping survey of generic adult learning in a specific area to establish how far learning provision meets the identified needs of older adults living in that area; and an analysis of pre-retirement courses and other curricula to prepare older people for retirement, and establish how far these meet the changing needs.
- 5.39 NIACE’s interlinking ‘Stage Posts’ and ‘Curriculum for Later Life’ proposals, and the research that accompanies these, are of critical importance because they raise profound questions and pinpoint many of the main issues:-

To what extent is policy emanating from national, regional and local government departments – including policy on employment, skills, and learning – still

²⁹⁵ Ford, G. & Watkins, B. (2000). What do I do now? Employment and guidance in the third age. *NICEC Careers Education and Guidance Bulletin*, 51, Winter.

²⁹⁶ Soulsby, J. (2004). *Stage Posts?* Leicester: Older and Bolder Programme, NIACE.

²⁹⁷ *Ibid*, page 5.

²⁹⁸ Alison Burt, Head of Communications at Guildford Borough Council, has written a useful research study – *Shock of the Old: Are Local Government Communications failing the Over-50s?* - which analyses how age stereotyping in local government (and by analogy in other organisations also) can undermine communications with older adults and impoverish the lives of people who wish to contribute and not be primarily the recipients of care.

²⁹⁹ Department for Work and Pensions (2004). *Link-Age: Developing Networks of Services for Older People: Building Partnerships*. Sheffield: DWP.

³⁰⁰ Soulsby, J. (2003). *DFES-NIACE: Older and Bolder Work Programme 2003-04*. Leicester: NIACE.

conditioned by age stereotypes?

How far does education and training provision meet the changing needs of older adults – and the changing expectations that society should have of third-age skills, experience and potential, including their more extensive utilisation and development?

To what extent are older adults – whether employed, unemployed, inactive or ‘retired’ – being consulted in depth about their learning and guidance requirements? And what kinds of information, advice and guidance do they feel they need in order to plan ahead wisely after 50?

How can older adults avoid isolation and continue to contribute to the community through paid or unpaid work, and through good citizenship?

Does the community place too much emphasis on reactive care, and insufficient on facilitating pro-activity and independence?

How far are older people’s images of themselves, their abilities and potential, shaped by the stereotypical attitudes in the community around them?

Is age legislation by itself going to be enough to retain older adults in work? Or does age legislation need to be accompanied by much greater emphasis on third-age training and retraining provision so that older employees and potential employees remain fully employable, and are not trapped by outdated skills and experience?

- 5.40 These are profound questions – and questions that are fast becoming urgent as more and more young people enter the labour force at a later age, and as the percentage of the UK workforce aged 45+ heads for a figure estimated by the DWP as reaching almost 40% by 2010³⁰¹.
- 5.41 There is a pressing need for policy reports in all four UK ‘home nations’ that review the implications of this figure, and the practical strategies and initiatives required to ensure there is no consequent loss of momentum in the UK economy. Such reviews would need to pay particular attention to the education, training and guidance needs of older adults, and the attitudinal changes required within industry, community and individuals – including those of older individuals themselves. The vision of lifelong learning implicit within the Scottish report, and in its aptly named title, *Life Through Learning – Learning Throughout Life*, needs to be converted into positive and practical strategies that engage all relevant government departments, and can therefore be implemented according to national need in all four of the ‘home nations’.
- 5.42 The current reality for many older adults is that learning is not genuinely lifelong. Inhibitions include a continued shortage of resources, and an apparent inability in some areas of government to appreciate that measures to encourage and enable the 45+ to renew and develop their skills, are not “the icing on the cake” but necessary for national growth and survival. Lifelong learning is also about creating lifelong opportunities for future generations. Those sections of this report that have focused on guidance for the young are also about preparing young people to gain the career management skills (including the ability to plan their own learning) that they will require throughout life.

- 5.43 Comprehensive and co-ordinated third-age strategies that recognise the central importance of sound guidance and lifelong learning provision have the potential to retain and re-engage many older adults actively in work and the community – with huge benefits for employers, individuals, communities and the national economy. Those benefits include future economic growth and survival. The 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.

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