How to deliver Midlife Career Reviews

Human Resources guide for implementing and managing Midlife Career Review

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Background

The need to support and retain older workers

The population is ageing. The birth-rate is declining, people are living longer, and the large Baby Boomer generation is headed towards retirement. By 2030, half of the UK's adult population will be over 50 years old.

This will affect the state's ability to provide more healthcare, social care and pensions with a shrinking working-age populations' taxes. In order to offset the significant impact that this will have on the economy, keeping people in age-friendly work for longer is crucial. Too many are leaving work years before State Pension age.

The employer needs to listen to their older workers, understand the challenges that they are facing - be it caring, health, an ageist culture, or lack of appropriate skills - and take action to provide much better support.

Human Resources department is crucial to the success and effectiveness of the Midlife Career Reviews. It is a tool that can benefit both the organisation and the individual.

Older workers are less likely to have career conversations with their line managers and less likely than younger workers to be encouraged to take up training and development opportunities (BITC, 2017). Some organisations have found age bias in performance reviews, redundancy processes and recruitment. Older employees are missing out on employment and development opportunities.

The Midlife Career Review aims to bring the older employees on an equal footing with their younger colleagues. It takes a serious and personalised approach to supporting an employee whose life priorities may be changing.

The employment issues facing people over 50

The population of workers aged over 50 is a very diverse group. People over 50 have different identities that influence their work life and the lens in which they view the world. They have different socio-economic backgrounds, levels of education, physical health, mental health, family circumstances and a range of other factors. However, once over 50, people are more likely to experience challenges or life events that can affect their work:

- Caring responsibilities peak, forcing some older employees – particularly women – to leave work;
- Health problems can cause a premature exit from the workplace;
- Age discrimination rises – in society, the employment market and workplace;

- Older workers experience age-based stereotypes;
- Redundancies often affect the older employees first;
- Training declines and career progression stops for many.

The majority of people over 50 want to work longer, for identity, status, financial considerations, intellectual stimulation, and not least, social engagement. Despite this, approximately one million older people have been pushed out of work.[i]

What is the Midlife Career Review?

The Midlife Career Review is **not** a performance review or appraisal – it does not review the performance of an employee, targets or objectives. It is a broader conversation about work, aspirations and challenges, now and in the future. It is an important step in understanding the needs, interests and aspirations of older workers; helping to maintain high employee engagement and productivity across all age groups.

How does the Midlife Career Review support older employees?

A Midlife Career Review can identify solutions to some of the above challenges. It can also support the engagement and wellbeing of employees, and with the right outcomes, keep them in work and productive for longer. The review can cover topics such as:

- **Aspirations for work and life,** consider how these might change over coming decades;

- **Further utilisation of older workers' skills** and experience;

- **Training availability** to develop skills and knowledge to better sustain employment and/or progress;

- **Implications of working longer for health**, and seek appropriate support where necessary, explore support from employer or other agencies;

- **The agile working environment** that will support all employees, including older workers;

- **Making informed retirement decisions** - about the phasing in and timing of retirement;

- **Understanding own life expectancy**, and its implications for work, leisure, finance and health.

What are stakeholders responsible for?

Human Resources	Organising training for line managers on delivering Midlife Career Reviews and workshops on Age at Work. Providing the advice and support that line managers need, such as information about the flexible working policy, carers policy, training opportunities and other information that may be required to support the employee and the outcomes of their Midlife Career Review. Storing the review documents, including the outcomes and agreed areas of further employee support, on their system. Ensuring that any necessary outcomes and changes required as a result of the review, that fall within the remit of HR, are implemented. Measuring the impact of the Midlife Career Review on key performance indicators such as performance ratings, retention, wellbeing and engagement of older workers.
Line Managers	Conducting the Midlife Career Review with their older employees (supported by training and guidance). Recording the outcomes and actions of the review and returning it to HR. Taking steps to provide support and make changes for the employee. This could include enrolling on a training course, having a new flexible working arrangement, calling out ageism to change the team culture, or other forms of support.
Senior leadership	Endorsing communications, undertaking Midlife Career Reviews if relevant and driving take up.
Internal Communications	Promoting the benefits of the Midlife Career Review and encouraging take up through regular internal communications.
Individuals	Reflective assessment on financial needs, life aspirations, strengths, whole life circumstances and what support they would like from their employer.

Responsibilities of Human Resources

Setting targets

Human Resources, possible along with the organisational leadership, should set goals, targets or key performance indicators for the Midlife Career Reviews – whether this is a pilot or being rolled out at scale.

Goals should be measurable and could include:

- Wellbeing and engagement scores of people over 50
- Job changes and promotions of people over 50
- Higher uptake of training, learning and development for people over 50
- Higher retention rates of people over 50 and for informal carers in particular

Providing information and guidance to line managers

Line managers need to know what the organisation can offer in terms of support and adjustments or changes to jobs, in order to deliver an effective and meaningful Midlife Career Review.

Briefings and information packs on policies related to these would enable line managers to deliver the right support to their employees:

- Carers,
- Flexible / agile working,
- Health and wellbeing,
- Career planning and job opportunities,
- Retirement and financial planning,
- Employee volunteering,
- Mentoring or coaching
- Training and development

Briefings should include signposting to other organisations / service providers that can provide additional services and support to the employee. These could include, but are not limited to: National Careers Service, financial advisers, learning provides, health centres, voluntary / community organisations.

Pre-Midlife Career Review survey

A pre-review survey will allow you to collect key data about the employees that are undertaking the reviews. This will enable you to measure who the reviews attract – what type of job they have, their gender, age and other identity information. Collecting this information ensures you are reaching a diverse range of older employees, and that the review works for people in different types of jobs and levels of seniority. This needs to be made clear on the survey so that people are willing to complete it.

The survey could include:

- Diversity characteristics including age, gender, race and sexual orientation.
- Level of seniority
- Job role
- Department / business function
- Main reason for taking interest in the Midlife Career Review

Implementing changes for individuals

Based on the agreement between the individual and their line manager, HR's role is to implement the changes that fall within their usual remit, such as a change to job design, technological support or facilitating promotions or job changes.

Remember to keep in touch with the line manager and individual employee with progress and update the review form.

Post-review surveys

The post-review survey can be used to collect feedback from the participants: their views on the session including what they liked and how it could be improved; whether they found it useful and whether they would recommend it.

A 6-month-on survey could be used to capture insights about what's changed for employees since their review. This could include information that is not necessarily stored on the Midlife Career Review form and does not necessarily relate to their role internally. It could include whether they have taken up volunteering or studying, whether they have made a retirement plan or sought advice from external organisations as a result of taking the Midlife Career Review.

Measuring impact and outcomes

Collecting a range of data will help to measure the effectiveness of Midlife Career Reviews. Data could include:

- Qualitative feedback from the Midlife Career Reviews from both older workers and line managers.

- Wellbeing and engagement survey scores for employees over 50.

- Retention of people over 50.

- Outcomes of the reviews including the number and proportion of people who:
  - Mapped out a career plan
  - Made a retirement plan
  - Started volunteering
  - Changed jobs
  - Changed career
  - Became self-employed
  - Improved their salary / received a promotion
  - Changed their working arrangements
  - Entered phased retirement

- Measurements related to the goals or targets that were set before rolling out Midlife Career Reviews.

Template Midlife Career Review form

This is a basic template that can be adapted for your organisation and employees.

Personal information	Name: Line manager: Job title:
Reason for MCR	What sparked the employee to take up the Midlife Career Review?
Introduction *Delete as appropriate*	Did the line manager explain the concept of the Midlife Career Review, how it differs to a performance review, and how it can benefit the employee? Yes / No
Time taken to complete the review	Session one: Session two:
Format: *Delete as appropriate*	Group / 1:1 In person / Face to Face
Employee's reflections on work	Most and least enjoyable aspects of work Work and life balance; external pressures or stresses (e.g. caring); wellbeing Aspirations or vision for work and life in the next 5/10/15 years

How the employer can support	Make a note of what was offered or described to the employee in terms of ideas, options, policies, signposting to other organisations and support from the employer.		
Next steps and agreed actions	What?	Who?	By when?
Next review	Date: Agree to revisit these issues / areas:		

References

[i] BITC (2014) The Missing Million – Report 1 https://age.bitc.org.uk/all-resources/research-articles/missing-million-report-1