



How to conduct Mid-Life Career Reviews

Guide for line managers to deliver Mid-Life Career Reviews to older employees

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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.

With the right training, you as a line manager are key to delivering this support – and the Mid-Life Career Review is your tool.

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). They are missing out on employment and development opportunities.

The Mid-Life Career Review aims to bring the older employees on an equal footing with their younger colleagues. It takes a 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 Mid-Life Career Review?

The Mid-Life 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 Mid-Life Career Review support older employees?

A Mid-Life 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 other people responsible for?

Human Resources	<p>Organising training for line managers on delivering Mid-Life Career Reviews and workshops on Age at Work.</p> <p>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 Mid-Life Career Review.</p> <p>Storing the review documents, including the outcomes and agreed areas of further employee support, on their system.</p> <p>Ensuring that any necessary outcomes and changes required as a result of the review, that fall within the remit of HR, are implemented.</p> <p>Measuring the impact of the Mid-Life Career Review on key performance indicators such as performance ratings, retention, wellbeing and engagement of older workers.</p>
Line Managers	<p>Conducting the Mid-Life Career Review with their older employees (supported by training and guidance).</p> <p>Recording the outcomes and actions of the review and returning it to HR.</p> <p>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.</p>
Senior leadership	<p>Endorsing communications and support for employees, personally undertaking Mid-Life Career Reviews if relevant and driving take up.</p>
Internal Communications	<p>Promoting the benefits of the Mid-Life Career Review and encouraging take up through regular internal communications.</p>
Individuals	<p>Reflective assessment on financial needs, life aspirations, strengths, whole life circumstances and what support they would like from their employer.</p>



Delivering the Mid-Life Career Review

Undertaking training

Before you deliver the Mid-Life Career Review, make sure you have undertaken training and an Introduction to Age at Work workshop. These will ensure you have a good grounding in the issues, as well as what your employer can offer in terms of support (flexible working, carers leave etc.).

After the training, you will be an 'age-smart' manager; more aware of the different issues facing people at different life stages, and more aware of the unconscious biases that people have towards people in different age groups. It will grow your confidence in having the Mid-Life Career conversation with your staff.

Approaching your older employees

Your employer will have promoted the Mid-Life Career Reviews to staff, including what is involved and the benefits they bring to individual employees and the business. This will make it easier to approach your colleagues – and for your colleagues to approach you.

Delivery format: where, when, how?

Mid-Life Career Reviews are designed to support employees in the issues that they are dealing with as individuals, so a personalised approach is needed.

- We recommend 1:1 sessions or small group sessions if people feel comfortable. Face to face is preferred, but 1:1 sessions can take place over telephone or online via skype / similar communications.
- Reviews can take place in multiple parts or one session and last around 2 hours.
- A private, comfortable room is crucial. If possible, conducting the review outside of the workplace could enable a more open and truthful conversation.





Conversation guide

How to actively listen

- Eliminate distractions, i.e. 'door knockers' and keep phones hidden.
- Concentrate on understanding what is being said.
- Summarise and repeat back to check your understanding of what is being said.
- Avoid interrupting and allow some pauses to let the person to finish.
- Use open, relaxed body language to encourage communication

Questioning techniques

- Ask open questions that start with 'who', 'where', 'how', 'when' and 'what', to allow for more holistic, subjective and detailed answers. Use some closed questions that prompt yes/no answers to ensure clarity and to check facts.
- Avoid suggesting answers and finishing sentences unless you've given the other person a good chance to speak.
- If you don't understand, probe further and don't guess or make assumptions.

Question set

These questions are a guide and cover themes that we have found to be important to many, but not all, older employees. You can select the questions that are most relevant to your organisation and the employee and their role or career options.

1. Introduce the conversation

Outline why this conversation is important to you, your organisation and how the employee can benefit. Explain that:

- i. Your organisation has recognised that people over 50 are integral to the future success of the organisation – they want to retain the skills, experience and knowledge that this group of workers have. How recent research has shown that people over 50 don't always get the same level of support or opportunity as the younger workers.
- ii. You as a line manager what to ensure that employees know what support and benefits are on offer, from flexible working to career progression for people of all ages.



- iii. You would also like to ensure you are doing a good job of managing, and that the employee feels supported and engaged.
- iv. The aim is to engage, retain and support the employee to continue to enjoy work, and to benefit from what the organisation can offer just as much as younger colleagues – that this is **not** about encouraging retirement.
- v. The review will take place yearly – or when necessary if the employee's circumstances change.

2. Work, career, progression

- i. What do you enjoy most about your job? Why?
- ii. What do you enjoy the least? Why?
- iii. If there were more opportunities to [stretch your skills / work on other projects / take up additional training or qualifications / work in another part of the organisation / be promoted] would you be interested? (Only ask these if there is a genuine opportunity– this is not always possible for people in front-line roles, for example).
- iv. I recognise that some people want to continue to progress and learn new skills, but some people don't – and that is fine. How do you feel about this right now, and would you like a change in the future?
- v. How do you envision your ideal future work life?

3. Work / life balance

- i. How do you feel about the balance you have between time at work and time outside of work? Could it be improved – and how?
- ii. Are there additional stresses on your time that we can help to support you with – either inside of outside of work?
- iii. Do you feel you have enough autonomy and support from us to manage competing priorities in work and in your personal life?

4. Offer of support / benefits

- i. If you ever need additional support, we offer these benefits to all employees (only say what is relevant and available)



- ii. *For example, to support carers: Carers Leave, Carers Passport, Login to Employers for Carers portal, signposting to external agencies and support, an employer network for informal carers.*
- iii. *Flexible working options, or agile working enabled by technology. This can include home working some or all of the time, working from different locations, working different hours.*
- iv. *Anything else that HR have advised they can offer or implement.*
- v. *Workshops / information on financial planning.*
- vi. *(For those who have raised their desire to retire) Phased retirements, pre-retirement workshops.*

5. Ask what the employee would like from the employer

- i. Is there anything that we can do to support you – now or in the future? Feel free to take some time to reflect and we can have another session.

Recording the conversation and actions

Your Human Resources department should provide the written template in which you record the conversation and the agreed actions going forward, including any changes or support that the employee would like.

1. Make notes on the form during the session – if the employee is happy for you to do so. The employee can make notes as well. Avoid making notes of personal or sensitive information.
2. Share the refined document with the employee so that they can review it and delete anything they do not want written down (for example, personal information).
3. Ensure any change that is required is recorded, along with next steps and a timeframe to manage expectations and ensure accountability.
4. Send it back to Human Resources so that they can store it securely and implement the changes that are required.
5. Update the document with HR and the employee when changes are made or support is given, for example, the employee has taken up Carers Leave or adopted flexible working.

This is a working document which means that it may be updated when actions are taken and changes are implemented.





References

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

