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Welsh Government

RESEARCH, DOCUMENT

# Working Wales mid-career reviews: research into current delivery and best practice (summary)

Research examining the initial evidence on the introduction of mid-career reviews (MCRs) by the Working Wales service.

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# Research aims and methodology

In November 2023, the Welsh Government commissioned Wavehill to undertake research examining the initial evidence on the introduction of mid-career reviews (MCRs) by the Working Wales service.

Launched in 2019 and delivered by Careers Wales, Working Wales is Wales' national impartial, professional, careers and employability support service, available for all those aged 16 and over <sup>[footnote 1]</sup>, and living in Wales. Through the service, careers advisers are available to support young people and adults with free advice, guidance and access to training to help them into work or further their career.

The introduction of MCRs is part of the Welsh Government's '**Stronger, Fairer, Greener Wales: A Plan for Employability and Skills**'. As noted in the plan, MCRs aim to 'encourage workers aged 50+ to proactively think about career and skills development, health and well-being, finance and work-life balance through Working Wales'.

The research aimed to address three primary research questions:

- What is the initial evidence on the introduction of MCRs by the Working Wales service?
- What is the evidence from Wales, the UK and internationally on the practice of career reviews?
- Is a target age group of 50+ for a MCR service appropriate?

The research was undertaken over a three-month period from December 2023 to February 2024. This included in-depth interviews with 10 careers advisers (all of which had experience delivering MCRs) and five stakeholders to support a greater understanding of how MCR's may differ from other careers advice offered by Working Wales and how it may be similar. The research also included

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a review of monitoring information (MI) data collected through Working Wales' customer relationship management (CRM) platform, Atlas, and a thematic desk-based literature review. The literature review considered 27 documents relating to MCRs to ensure that the evaluation findings can meaningfully contribute to this body of work.

## Main findings

### Initial design and implementation findings

Responding to the MCR announcement within '**Stronger, Fairer, Greener Wales: A Plan for Employability and Skills**', Careers Wales undertook some initial internal research to identify the needs of older workers as well as good practice related to changing careers. As a result, Working Wales developed new features as part of their offer that they felt would help specifically address the needs of customers over the age of 50. However, Working Wales made the decision to offer new features of support to any customers that advisers felt would benefit. New aspects of the offer included the Morrisby psychometric test, additional staff training to support customers looking to change career and a new marketing strand.

Reflecting on the design of the MCR offer, stakeholders <sup>[footnote 2]</sup> felt that Working Wales had an opportunity to set the standard for good practice in the field of career reviews on a Wales-wide scale, noting that they perceived current provision across the UK to be either very localised or not free to use.

Many advisers emphasised that the need for a career review did not correlate with age, noting that customers from their early twenties to their mid-sixties had benefitted from a MCR. However, the topics discussed in a career review often varied based on age, with older customers more likely to want to discuss care responsibilities as well as financial and health planning.

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The flexibility of the MCR, combined with the high demand from a range of different customer types, has made it challenging for careers advisers to differentiate between an MCR and the careers guidance which has been offered since Working Wales' inception. These factors are believed by stakeholders and advisers to be the main reasons why it was not possible to quantitatively monitor whether a customer has been through an MCR. Advisers would instead monitor the content and progress of MCRs through notes submitted on their CRM.

Recognising that some customers considering a career change can be unsure on their next steps or preferred career pathway, the Working Wales management team decided to incorporate the Morrisby test as a feature of the MCR. Working Wales spent £12,500 to acquire a Morrisby test license to allow customers - when deemed appropriate - to undertake a free (at the point of use) psychometric test <sup>[footnote 3]</sup>. The psychometric test aims to pinpoint customers' professional strengths, weaknesses and transferable skills to identify potential career paths which suit their skillset.

Careers advisers stressed that the Morrisby test was best completed alongside expert careers guidance and was not necessarily suitable for all customers. Careers advisers flagged that the results do not account for labour market intelligence and could, theoretically, recommend career paths that aren't necessarily realistic for customers when taking a holistic understanding of their individual situation into account. The test was viewed as helpful, as long as staff were able to frame it as an 'ideas generating exercise' rather than a definitive decision-making tool.

An analysis of the Working Wales' MI from January to November 2023 shows that roughly two per cent of all customers (N=563) completed a Morrisby test. Customers in the 40 to 49 and 50+ age groups were relatively more likely to use the Morrisby test when compared with the overall age distribution of customers. However, the monitoring information also shows that half of Morrisby test users were under the age of 40, aligning with adviser testimony that age usually was not a factor in determining whether a customer would benefit from a career

review.

Most careers advisers had attended the Career Re-invention webinar offered by Careers Wales. Feedback was positive and some careers advisers found the webinar reassuring, as they felt it confirmed that they were already well-equipped to deliver MCRs. They understood from the training that this form of support relied on the same skillset as more general careers guidance, with the addition of specific tools.

The majority of careers advisers interviewed attended the Follow the Money Guiders training. They found the training to be useful in strengthening their understanding of the financial support landscape. Overall, careers advisers felt better equipped to send customers to the appropriate financial support provider, but still felt that offering any support themselves is outside of their remit.

The Working Wales team developed their marketing approach to better engage prospective audiences with MCR support. This included developing a series of case studies, showcasing the stories of a range of individuals who have undertaken a career review, and a more 'emotive' campaign emphasising the impact a career review could have on an individual's job satisfaction and work-life balance. Careers advisers and stakeholders were positive about the revised marketing approach, suggesting that the new campaign clearly and succinctly engaged people.

The term 'mid-career review' or 'career review' was also viewed positively by careers advisers, especially as a way to market the support. Whilst careers advisers stated that they rarely use it in day-to-day work, with customers and partner organisations, they noted that giving the mid-career review a label was useful. Some thought that the title helped raise public awareness that careers advice is available to people of all ages and in all employment circumstances, tackling misconceptions that support was only designed for school-leavers and unemployed people.

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Careers advisers reported a clear customer need and desire for MCRs. They said this type of support was invaluable and extremely beneficial for their customers, and they were not aware of any other organisations in Wales that provide a comparable service. Some thought that approaching the support as a MCR gave structure to the reflective process, while others pointed towards the person-centred nature of service provision as a critical factor in success.

The prevalence of ageism in the workplace was viewed by careers advisers as an ongoing barrier in supporting older customers, alongside stereotypes of age and work, and the continued perception that careers guidance is only for young or unemployed people. Some advisers also found it challenging to support customers with high support needs due to limitations on resources.

## **Reviewing the practice of Career Reviews in Wales and the UK**

The desk-based review did not uncover a large body of literature from the UK relating to the practice of career reviews. Research and literature in the UK has generally focussed more on the attitudes of older workers or served as advocacy pieces for specific changes in practice such as greater focus on supporting older workers with pension planning. A large-scale programme like Working Wales could take a leading role in understanding and outlining good practice for career reviews for workers of all ages.

Primary evidence from this research, as well as evidence from the literature, have demonstrated that many workers, regardless of their age, benefit from a career review that is tailored to their current work situation and future aspirations and desires. However, the literature has also highlighted that career reviews are often misunderstood, with workers often noting that the reviews had greatly surpassed their initially low expectations.

The literature emphasises that older workers in particular are more likely to face

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challenges relating to their financial situation, either in terms of debt or pensions, indicating that training to improve advisers' understanding of financial advice and the organisations best suited to provide support aligns well with good practice.

## Reviewing the practice of Career Reviews internationally

The literature has highlighted the wide array of factors that can impact on an individual's ability to work, the tailored approach taken by Working Wales in their MCRs may be an effective way to deliver this kind of support.

The Work Ability Model originated in Finland in the early 1980s. The model's initial purpose (and the corresponding Work Ability Index) was to predict retirement age, having a strong routing in health research <sup>[footnote 4]</sup>. The model has since integrated factors relating to an individual's abilities and knowledge relating to work, as well as their motivations in work life. Implementing practice like the WAI may support careers advisers and customers in identifying health-related needs, which would enable more effective signposting to qualified health professionals as part of a career review.

## Conclusions

The recognition of Working Wales' key position in delivering MCRs has allowed the service to grow by broadening their career review offer and providing the opportunity to complete the Morrisby psychometric test when appropriate. This also resulted in enhanced marketing, centred around a 'career review', to specifically target an older age group and provided training opportunities to careers advisers to further develop their knowledge around financial support and signposting.

This research indicates that workers often benefit from a career review more



than they initially anticipate. The widespread benefits derived from employed individuals engaging with a MCR suggest that it would be beneficial for Working Wales to work with employers to offer career reviews. Marketing has a strong role to play in communicating to potential customers how a career review could benefit their current situation.

This research has also found that the need for a career review or its initial implementation does not change considerably with age. MCRs delivered by Working Wales took a tailored approach to support from the outset, aiming to address the challenges presented by their customers whilst also sharing labour market information and current and future skills gaps.

Although the introduction of the MCR from a marketing perspective has been viewed very positively, its use as terminology to describe a career review has, at times, caused confusion amongst staff. Careers advisers noted that they do not typically use the term 'mid-career review' when discussing with customers and that there was no clear distinguishing factor which allowed for MCRs to be easily monitored as a separate service to careers advice. It is clear that the MCR offer is not largely different to Working Wales' support offer prior to the announcement of MCRs.

Advisers were broadly positive about the training they had received in preparation to deliver the MCRs and the Morrisby tool. The Morrisby psychometric test was perceived by staff to be a useful tool when dealing with customers who were unsure about their next career steps and had a sufficient level of IT skills. However, where a customer completes the test without professional guidance from a careers adviser, there are risks they are receiving lower quality advice than if they were solely engaging with the careers adviser.

# Recommendations

Based on the evidence collected in this research, the following recommendations have been identified to aid and improve future delivery of MCRs.

## Recommendation 1

Working Wales should continue to offer career reviews to customers of all ages and to those who are employed, but move away from 'Mid-Career Reviews' and rebrand the Working Wales' offer as 'Career Reviews'. This will ensure that career reviews continue to be viewed as accessible and beneficial support for customers of all ages. 'Career Reviews' should be used as the terminology in Working Wales' marketing. Evidence collected as part of this research suggests that the term is clearer in communicating the services and support that can be offered to potential customers.

## Recommendation 2

The career review support offer should remain tailored to meet the specific needs of individual customers, taking into account labour market intelligence and current and future skills gaps. Working Wales should also expand its network of trusted organisations to enable signposting to organisations specialising in areas like mental and occupational health. By doing so, Working Wales can ensure that the career review offer effectively supports individuals and contributes to future-proofing Wales' workforce.

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## Recommendation 3

Careers Wales should proactively seek to understand the different issues faced by different customer cohorts requiring a career review to further enhance targeted marketing. Careers advisers and stakeholders highlighted that targeted marketing for MCRs has successfully engaged older customers because marketing material has effectively and emotively presented the concerns and needs of that demographic. Marketing that explicitly references the challenges faced by workers at different stages of their career may serve to more effectively communicate the benefits of Working Wales' offer to a range of customers.

## Recommendation 4

If greater definitive exploration of the reach of the career review offer or the impact of career review support is required, separate from the wider Working Wales support offer, tangible identifiers within monitoring information will be required. This could include tracking specific conversation topics e.g. retirement planning, customers wanting to change industries or wanting to upskill within their own field, or other quantifiable measures. Within this research, it has not been possible to distinctly assess the reach of the MCR offer within Working Wales because the offer is perceived by stakeholders and careers advisers as being indistinct from the support customers typically receive from Working Wales. Any further research to understand the added value and impact of career reviews on customers' outcomes, distinct and separately from the wider Working Wales offer, including longitudinal research, will require this monitoring framework as a foundation.

## Recommendation 5

Welsh Government should maintain regular dialogue with Working Wales, which includes the discussion of emerging policy and findings from programme delivery, thereby ensuring that Working Wales remains strategically positioned to respond to the needs of a Fairer, Stronger and Greener Wales.

## Footnotes

[1] Please note that this includes young people aged 15 where they will turn 16 in the same academic year.

[2] Stakeholders in this report refers to both internal and external stakeholders.

[3] It is understood that this license equated to 500 Morrisby tests for Working Wales customers.

[4] [Comcare, The Work Ability Approach](#), August 2013.

## Contact details

Report authors: Rhys Maher, Anna Burgess, Shanti Rao, Andy Parkinson, Oliver Allies

Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government.

For further information please contact:

Sean Homer

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Social Research and Information Division  
Knowledge and Analytical Services  
Welsh Government  
Cathays Park  
Cardiff  
CF10 3NQ

Email: [KASEmployabilityandSkillsResearch@gov.wales](mailto:KASEmployabilityandSkillsResearch@gov.wales)

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