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# Working Wales Mid-Career Reviews: research into current delivery and best practice

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## Working Wales Mid-Career Reviews: research into current delivery and best practice

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

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## Glossary

<b>Acronym</b>	<b>Definition</b>
CRM	Customer Relationship Management
DWP	Department for Work and Pensions
IAG	Information, Advice and Guidance
MCR	Mid-Career Review
MI	Monitoring Information
NIACE	National Institute of Adult Continuing Education
NICE	National Institute for Health and Care Excellence
ONS	Office for National Statistics
PLA	Personal Learning Accounts
SME	Small and Medium Enterprises
WAI	Work Ability Index

## 1. Introduction/background

- 1.1 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. As part of the research, Wavehill were asked to provide an overview of the current Working Wales mid-career review offer and to gather evidence from Wales, the UK and internationally on the practice of career reviews.
- 1.2 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>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.
- 1.3 The introduction of MCRs is part of the Welsh Government's plan for employability and skills: '[Stronger, fairer, greener Wales](#)'. 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 context surrounding the introduction of MCRs is covered in more depth in section 2.

### The research

- 1.4 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?

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<sup>1</sup> Please note that this includes young people aged 15 where they will turn 16 in the same academic year.

## Methodological approach<sup>2</sup>

1.5 The research was undertaken over a three-month period from December 2023 to February 2024, the following approaches were applied:

- In-depth virtual semi-structured interviews lasting 45 minutes to an hour via Microsoft Teams with ten careers advisers (all of which had experience delivering MCRs) and five key stakeholders. To identify the most appropriate staff to engage, researchers asked the Careers Wales management team to provide a sample of careers advisers, across each regional team, who had experience of delivering MCRs<sup>3</sup>. Of the 127<sup>4</sup> advisers, a list of 10 careers advisers was supplied (8% of the total workforce). Please note that at least two to three staff per region were interviewed. A list of stakeholders was also provided which included a series of individuals within Careers Wales with strategic oversight of MCRs and individuals external to the organisation that supported the design of the service. The aim of the interviews was to develop a greater understanding of how MCR's may differ from other careers advice offered by Working Wales and how it may be similar. Furthermore, advisers and stakeholders were asked about the perceptions of new tools more recently embedded into the Working Wales service, including the Morrisby psychometric test and additional training for careers advisers (see paragraph 3.3). These interviews took place between January and February 2024. All qualitative data were thematically analysed using grounded theory methodologies<sup>5</sup>. The discussion guide used for the interviews can be found in Annex C.
- A review of monitoring information (MI) data collected through Working Wales' customer relationship management (CRM) platform Atlas. The Atlas system

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<sup>2</sup> The proposed methodology for this research also included disseminating online surveys to Working Wales customers who had undertaken a MCR. This aspect of the fieldwork did not take place due to limited timescales and because researchers and Welsh Government agreed that it would add little value to the research to explore the experiences of a small sample of customers.

<sup>3</sup> It is understood that the Careers Wales management team asked management staff in each regional team to identify which staff had the most experience delivering MCRs and who had undertaken the associated training i.e. Money Guiders training.

<sup>4</sup> Please note that this figure has been rounded from 126.8 full-time equivalent staff.

<sup>5</sup> [Bryman, A., Quantity and Quality in Social Research, 1998](#) and [Charmaz, K., Grounded Theory: Objectivist and Constructivist Methods, in N.K. Denzin and Y.S. Lincoln \(eds.\) Handbook of Qualitative Research 2nd Edition, 2000.](#)

collects quantitative data about the characteristics of Working Wales customers, which was the focus of the analysis for this research. The analyses were performed on a subsample of data collected between January and November 2023, the year MCRs were introduced, which detailed support for 26,329 unique customers<sup>6</sup>.

- A thematic desk-based literature review of 27 documents relating to MCRs. Documents included previous evaluations undertaken of Mid-Career Review projects across the UK, advocacy pieces relating to careers advice for older workers, research into the needs and attitudes of older workers in the UK, and academic literature relating to occupational health, career transitions and sociology<sup>7</sup>. After curating relevant materials, researchers critically analysed and summarised key findings that related to MCRs. The synthesis of this information included identifying patterns, discrepancies and gaps in existing literature. This process was undertaken to contextualise current practice in Wales relating to MCRs to ensure that the evaluation findings can meaningfully contribute to this body of work. Please note that a full list of source references can be found in Annex A and a literature review protocol can be found in Annex B.

### **Limitations and considerations**

- 1.6 The proposed methodology for this research included an analysis of Working Wales MI data which would review the characteristics of customers who had undertaken an MCR. However, as a result of further conversations with Careers Wales staff, researchers were made aware that the quantitative MI data does not explicitly monitor whether individuals had undertaken a Mid-Career Review. Therefore, the MI analysis focussed on those that had undertaken a Morrisby psychometric test through Working Wales as well as the age distribution of Working Wales customers. A more detailed discussion of how MCRs were monitored can be found in section 3.

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<sup>6</sup> Please note that the Working Wales evaluation reports refer to 'customer engagements' rather than unique customers. Both terms relate to the total number of individual customers who engaged with Working Wales.

<sup>7</sup> The following search terms were used in the literature review to identify the relevant documents: mid-life career change, mid-life career review, mid-career change, mid-career transitions, mid-career review, career change, career change advice, career change guidance, career change review, career change transitions, career switch, return to work career guidance, careers guidance to older people. The full review protocol is included in Annex B at the end of this report.



1.7 This research began in December 2023, meaning that analysis of Working Wales customers in 2023 (the year when MCRs were introduced) covers customers who initially engaged with Working Wales between January and November 2023. In cases where 2023 is compared with previous years of Working Wales delivery, other years include observations from the full calendar year.

### **Report structure**

1.8 The remainder of the report is structured as follows:

- Section 2 sets out the policy and socio-economic context which has driven the rationale for MCRs as part of the wider Working Wales offer.
- Section 3 reflects on the initial design and implementation of MCRs within Working Wales.
- Section 4 summarises evidence from Wales and the rest of the UK on the practice of career reviews, focussing on identified best practice as well as other implementation models that aim to deliver similar support to the MCR.
- Section 5 summarises international evidence relating to career reviews. The review did not find any documents directly discussing the practice of career reviews as delivered by Working Wales, however the literature discussed bears relevance to the practice of MCRs.
- Section 6 provides a summative set of conclusions and recommendations based on analysis throughout the report.

## 2. Context

- 2.1 The Working Wales service, delivered by Careers Wales, is a national impartial, professional, careers and employability support service, which is available to all those aged 16 and over, and living in Wales. 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. Anyone in Wales considering a career change can book a free career review with Working Wales.
- 2.2 This section explores the socio-economic and policy context that led to the launch of MCRs as part of the Working Wales service.

### **Socio-economic context**

- 2.3 Announced at the end of 2022 and launched in 2023, MCRs are a medium to encourage older workers to take a multifaceted view of their careers moving forward. The introduction of MCRs aimed to address both newer economic challenges, that emerged in the wake of the coronavirus pandemic, as well as longer term economic challenges posed by demographic changes and other factors.
- 2.4 During the coronavirus pandemic, the Welsh and UK economies were characterised by a growth in the number of economically inactive people<sup>8</sup> as well as a rise in the rate of early retirements<sup>9</sup>. The early stages of pandemic recovery saw the growth of labour demand outpace the growth of labour supply, leading to a tighter labour market with job vacancies peaking in 2022. This was caused by a higher rate of economic inactivity paired with a lower level of net migration from EU countries following the UK's departure from the European Union, leading to a fall in the number of people in the labour market<sup>10</sup>.
- 2.5 The pandemic has also altered the type of labour that employers are demanding by accelerating the digitisation of the economy. The proportion of hybrid workers across the UK has remained above pre-pandemic levels<sup>11</sup>, driving an overall growth in the demand for digital skills. Research, from the UK's Department for Education,

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<sup>8</sup> [House of Commons Library, UK Labour Market Statistics](#), January 2024.

<sup>9</sup> [House of Lords Economic Affairs Committee, Where Have All the Workers Gone?](#), December 2022.

<sup>10</sup> *Ibid.*

<sup>11</sup> [Office for National Statistics, Is Hybrid Working Here to Stay?](#), May 2022.

uncovered that a range of manual professions were at an increased risk of becoming automated and that the demand to use new specific hardware and software had increased among employers<sup>12</sup>.

- 2.6 Paired with these newer economic challenges, Wales (as well as a majority of European countries) face longer term economic issues driven by demographic changes and an ageing population.
- 2.7 Wales' population growth is slowing, having increased by 1.4% (44,000) between the 2011 and 2021 censuses compared to a growth of 5.5% (168,000) between the 2001 and 2011 censuses. The population growth rate in Wales is also considerably lower than in England, which grew by 6.6% (3.5 million) between the 2011 and 2021 censuses<sup>13</sup>. One of the contributors to this is a drop in the annual number of births in Wales. According to the Office for National Statistics (ONS)<sup>14</sup>, live births in Wales have dropped roughly 19.7%, from 35,238 births in 2012 to 28,296 births in 2022, over the same time period in England, live births dropped roughly 16.9%, from 694,436 to 577,183 births.
- 2.8 Wales has an ageing population, with people who are 65 years or older making up 21.3% of the population (compared to 18.4% in the 2011 census)<sup>15</sup>, this is the highest level recorded. Looking over a longer timeframe, between 1990 and 2016, average life expectancy in Wales has increased from 75.8 years to 80.4 years. Notably, the gap between life expectancy and healthy life expectancy has remained relatively consistent in this time period<sup>16</sup>. The state pension age has moved far less over the same period, increasing from 65 to 66 in 2018, and expected to increase again to 67 between 2026 and 2028<sup>17</sup>. This likely means that more people will be living for longer relying on their pensions, which may not be sustainable as a sole source of income<sup>18</sup>. Additionally, due to the ongoing cost-of-living crisis, more

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<sup>12</sup> [Department for Education, Skills needs in selected occupations over the next 5-10 years](#), August 2022.

<sup>13</sup> [Welsh Government, Population and Household Estimates for Wales \(Census 2021\)](#), June 2022.

<sup>14</sup> [Office for National Statistics, Births in England and Wales](#), February 2024.

<sup>15</sup> [Welsh Government, Population and Household Estimates for Wales \(Census 2021\)](#), June 2022.

<sup>16</sup> [Public Health Wales, Life Expectancy and Mortality in Wales](#), February 2020.

<sup>17</sup> [Department for Work and Pensions, State Pension age Review](#), March 2023.

<sup>18</sup> [Pensions Policy Institute and Age UK, How could increased economic inactivity affect financial resilience among older people?](#) March 2023.

people are working for longer and/or returning to work after retiring due to financial pressures.

- 2.9 In Wales, the employment rate of people aged between 50 and 64 rose from 62.3% to 68.0% between March 2013 and March 2023<sup>19</sup>. Workers in this age group are likely to require a range of different employment needs to younger workers, for example, additional support due to health conditions. In the same time period, the employment rate among people aged over 65 dropped slightly from 8.2% to 8.0%. Furthermore, in the ONS's Over 50s Lifestyle Survey (2022), workers between the ages of 50 and 59 were more likely to report stress and lack of support as the reasons for leaving employment instead of voluntarily choosing to retire<sup>20</sup>.
- 2.10 With a decline in birth rates and slowing population growth, it is likely that the needs of Wales' economy will have to be met in part by older workers. Paired with the fact that a considerable proportion of older workers are leaving the labour market prematurely, the rationale for an intervention that aims to ensure workers can be happier and healthier in the workforce for longer is clear.
- 2.11 Paired with demographic challenges, the adult population of Wales has long faced issues relating to lagging wages behind the rest of the UK. It is described in ['Stronger, Fairer, Greener Wales: A Plan for Employability and Skills'](#) that, at the time of writing, 40% of people in Wales living in poverty were in employment.

### **Policy context**

- 2.12 MCRs were first announced at the end of 2022 as a policy commitment within ['Stronger, Fairer, Greener Wales: A Plan for Employability and Skills'](#) 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 plan highlighted that MCRs would be one area of support to help workers respond to a fast-changing economy. Prior to this commitment, the Working Wales offer already included support to anyone over the age of 16 living in Wales considering a change in their career. As a result of the 2022 plan, Careers Wales developed a standalone

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<sup>19</sup> [Office for National Statistics, Labour market by age group: People by economic activity and age \(seasonally adjusted\)](#), September 2023.

<sup>20</sup> [Office for National Statistics, Reasons for workers aged over 50 years leaving employment since the start of the coronavirus pandemic: wave 2](#), September 2022.

MCR offer that sat within the wider Working Wales support. This offer included a new marketing campaign targeting individuals who may be interested in a career review and the introduction of [Morrisby psychometric assessments](#) when deemed appropriate by careers advisers. The first phase of the Careers Wales MCR marketing campaign took place in March and April 2023, and served to outline the introduction of this support for customers into the marketplace.

- 2.13 The commitment for MCRs made in the employability and skills plan also supported objectives set out in the '[Strategy for an Ageing Society](#)', namely relating to promoting the re-skilling of older workers and encouraging age friendly work places. Responding to the accelerated adoption of different technologies as a result of the coronavirus pandemic, the Welsh Government published '[Covid Reconstruction – Challenges and Priorities](#)' in October 2020, which identified a number of priorities for the economy including 'helping individuals and Welsh firms to transition to the economy and jobs of the future, including building on existing skills programmes and creating an environment of lifelong learning'.
- 2.14 As a part of Working Wales' broader offer, MCR's have become integrated into Wales' employability support landscape, supporting customers that directly approach Working Wales as well as supporting customers referred to Working Wales by other initiatives like the Job Centres and Midlife MOT website<sup>21</sup> run by the Department for Work and Pensions (DWP).
- 2.15 MCR's also run alongside Business in the Community Cymru's delivery of MCR Webinars<sup>22</sup>. These free webinars provide signposting, tips and advice for workers aged 50+ to support them to make informed decisions about their work, health and finances.

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<sup>21</sup> [UK Government, Midlife MOT](#)

<sup>22</sup> [Business in the Community, Mid-Career Review Webinars](#)

### **3. Initial design and implementation findings**

3.1 The following section outlines findings regarding the initial design and implementation of MCRs within the wider Working Wales support offer. The evidence and analysis presented in this section is based on interviews conducted with careers advisers and key stakeholders as well as an analysis of the MI data from Working Wales' CRM platform.

#### **The initial design**

3.2 Recognising the impartial career review support that careers advisers already provided to customers, the Welsh Government's ['Stronger, Fairer, Greener Wales: A Plan for Employability and Skills'](#) identified that it would be appropriate and fitting for Working Wales to deliver MCRs.

3.3 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. This research involved developing a greater understanding of the needs of older workers as well as identifying any support available in the UK that helped workers specifically to change careers. External stakeholders, that Working Wales staff consulted with during the design of their MCR offer, felt that the existing Working Wales offer would align well with new enhancements for a new MCR offer.

3.4 Based on research undertaken internally, 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 the new features to any customer that an adviser felt would benefit, as was common practice from the careers advice offered by Working Wales prior to the introduction of MCRs. Working Wales introduced the following aspects to their offer to support in their delivery of MCRs:

- The Morrisby psychometric test: Career Wales purchased licenses to allow customers to undertake a free psychometric test. The test aims to pinpoint customer's professional strengths, weaknesses and transferable skills to identify potential career paths which suit their skillset.

- Additional staff training: Careers advisers were offered additional training to support people with looking to change career (the Career Re-invention webinar) and financial challenges (the Money Guiders training), these were identified in Careers Wales' initial research as areas of support that older workers were more likely to need relative to younger workers.
- New marketing strand: Working Wales amended its marketing approach to focus more on the emotional aspects of career development such as satisfaction at work or work-life balance.

### **Mid-Career Review delivery model**

- 3.5 It was felt by stakeholders<sup>23</sup> 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.
- 3.6 As highlighted in Section 3.2, the Welsh Government introduction of MCRs acknowledged Working Wales' existing career review support. Careers advisers reflected that, prior to the introduction of MCRs, their support has always been tailored to customers, regardless of whether it was standard careers advice or a career review. Careers advisers viewed MCRs as broadly similar to the existing careers advice offer provided by Working Wales. They explained that their approach to supporting customers is always tailored to the individual's unique situation and their individual needs, including any age-related factors. For each customer, this might include understanding an individual's transferable skills and experience, their aptitudes, discussing new career options, ambitions, and identifying goals and barriers. Careers advisers would always consider training needs, skills gaps, and labour market information. They therefore found it difficult to pinpoint the unique aspects of a MCR.
- 3.7 Throughout the interviews, careers advisers stressed the need for person-centred and tailored support for all customers. While the support needs of customers often varied by customer age, support needs also varied by a great many other customer

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<sup>23</sup> 'Stakeholders' in this report refers to both internal and external stakeholders.

identities and situational factors. They undertake a holistic exploration of each customer's current situation, including their current career, work-life balance, health, and financial security. They then support customers to make realistic plans and set achievable goals. Advisers ultimately felt that tailoring support to a customer considering a career change required the same skillset and approach as providing person-centred careers guidance.

3.8 In terms of demand, advisers noted that the vast majority of customers did not explicitly request a 'MCR, however once their ambitions and barriers were discussed, it was clear that many would benefit from a MCR. Many advisers also 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. Careers advisers stated that whether an MCR was suitable for an individual customer depended on their personal circumstances, rather than their age.

3.9 However, the topics discussed in a career review often varied based on age. Advisers noted that older customers were more likely to want to discuss care responsibilities as well as financial and health planning.

'I don't think [the MCR] differs massively, the skills we use are generally the same. The focus of our guidance is determined by the needs of the customer.

We focus on "career anchors" for everyone, but for older customers the anchors they are more likely to encounter, might for example, be care for older parents or their resilience in older life.' **Careers Adviser Interview**

3.10 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 platform. Advisers mentioned that their initial notes would most commonly include the customers' current situation, as well as their challenges and aspirations, notes would then be updated with any further topics discussed and any further support they've been



referred to. However, even for the written notes, some advisers could not recall whether they had explicitly noted whether a customer had undertaken a career review.

- 3.11 Despite the similarities between MCRs and the careers guidance offered more generally by Working Wales, stakeholders and careers advisers named some recently introduced aspects of Working Wales' support offer which had been integrated into the MCRs. These changes will be explored in further detail in the following sub-sections.

### **Adviser perspectives on the Morrisby psychometric test**

- 3.12 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>24</sup> The test aims to pinpoint customers' professional strengths, weaknesses and transferable skills to identify potential career paths which suit their skillset. The Morrisby test was not available through the medium of Welsh.
- 3.13 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. Careers advisers suggested that the test was most useful in identifying customer strengths and transferable skills, for generating new career ideas for customers, and helping them to reflect on potential career paths. Interviews with careers advisers determined that there is not a clear or rigid assessment which determines whether a customer completes a Morrisby psychometric test and is, instead, determined by career adviser conversations with the individual customers.
- 3.14 At the same time, careers advisers stressed that the Morrisby test was best completed alongside expert careers guidance. This was partly to ensure that customers understood the benefits and limitations of the questionnaire. 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

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<sup>24</sup> It is understood that this license equated to 500 Morrisby tests for Working Wales customers.

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.

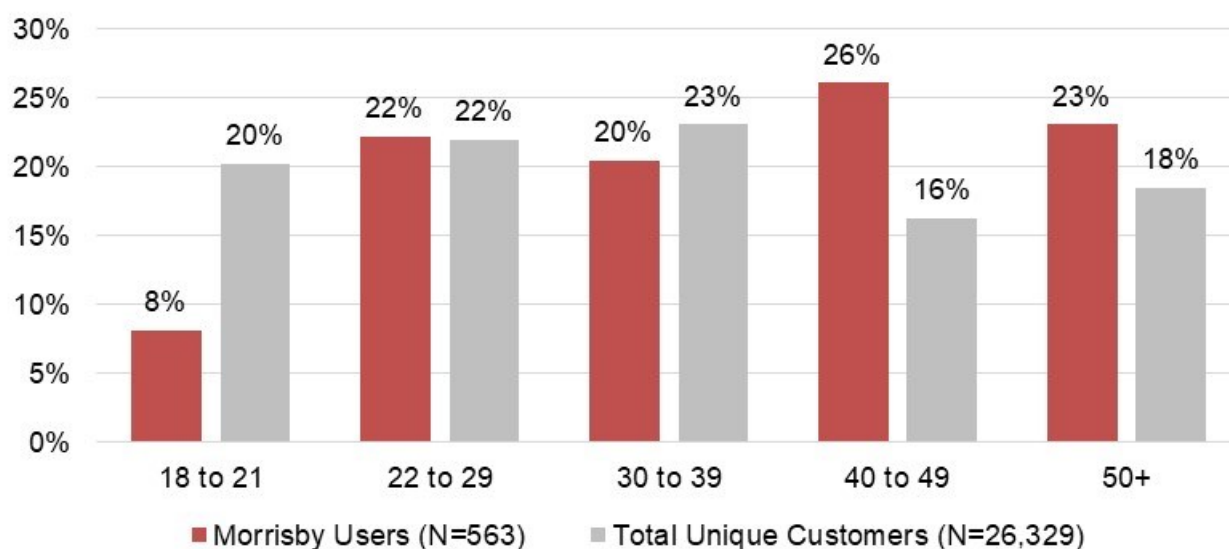
- 3.15 However, several careers advisers expressed concerns that the Morrisby questionnaire was not necessarily suitable for all customers. Advisers' responses were consistent when asked what kind of customer benefited the most from the test, these were customers who had previously come from a professional background and customers who were unsure what kind of career path they wanted to pursue. Advisers noted that the full version of the test usually could take between 90 minutes to three hours to complete and could ask complicated or confusing questions, meaning they felt it was only appropriate to suggest the test to customers who were used to working at a computer for that amount of time. There was broad consensus that the shorter version was more suitable in supporting careers guidance.
- 3.16 Careers advisers thought that the test could present a barrier to customers who are not confident using technology, or who might be uncomfortable with completing 'tests' due to negative experiences with the education system. There were additional concerns that, in a small number of cases, if test results suggested that an individual had limited skills in certain areas, it could damage their confidence. Some recommended that staff should be able to use their professional judgement on whether to offer the Morrisby test as part of a MCR, with the ability to skip the test if they think it might deter a particular customer.

### **Analysis of Morrisby psychometric test monitoring data**

- 3.17 An analysis of the Working Wales' MI from January to November 2023 shows that roughly 2% of all customers (N=563) completed a Morrisby test. The analysis of the MI focussed on understanding the distribution of Morrisby test users across a series of measured characteristics, as well as comparing this distribution with the overall distribution of unique Working Wales customers between January and November 2023.
- 3.18 Figure 3.1 illustrates the age distribution of Working Wales unique customers as well as the age distribution of unique customers who undertook a Morrisby test. The figure shows that customers in the 40-49 and 50+ age groups were relatively more

likely to use the Morrisby test when compared with the overall age distribution of customers. Analysis shown in the figure bears relevance to the research’s aim to understand whether people over the age of 50 were an appropriate target group for MCRs. The monitoring information 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.

**Figure 3.1: Age distribution of Morrisby test users and total unique customers between January and November 2023**



Source: Working Wales Monitoring Information<sup>25</sup>

3.19 Table 3.1 outlines that Working Wales customers who undertook a Morrisby test were more likely to be women and more likely to have referred themselves into Working Wales when compared with the overall distribution of Working Wales’ customers in 2023.

<sup>25</sup> Please note that data labels may not sum up to 100% due to rounding.

**Table 3.1: Proportion of Morrisby test users and total unique customers between January and November 2023 with a certain measured characteristic**

Measured Characteristic	Morrisby Test Users (N=563)	Total Unique Customers (N=26,329)
Self-referred into Working Wales	67%	48%
Women	53%	39%

Source: Working Wales Monitoring Information

- 3.20 The distribution of total unique customers in 2023 and the distribution of customers who undertook a Morrisby test were also analysed by geography. Although Working Wales customers in certain local authorities appeared to be more likely to undertake a Morrisby test compared to the overall distribution of customers in 2023, there weren't any clear patterns or clusters to explain these disparities. When the distribution of Morrisby test users was analysed by local authority the patterns of over- or under-representation did not correlate with the areas covered by different Working Wales teams, indicating that certain teams of advisers were not more likely to use the Morrisby test compared to others.
- 3.21 The timings of Morrisby tests between January and November 2023 were also analysed to see whether there were any spikes or time periods with heightened use. The number of Morrisby tests occurring each day remained relatively consistent across the entire time period without any significant spikes. When interviewed, none of the careers advisers indicated that there were certain periods where the Morrisby was used more frequently than other periods.

### **Training**

- 3.22 Most careers advisers had attended the Career Re-invention webinar offered by Careers Wales, though some had attended a long time ago so found it difficult to recall. Feedback, from those who remembered the content, was positive, with one specifically mentioning that the information on older people's needs was useful. Some careers advisers had 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.

- 3.23 It is however important to note that careers advisers from certain regions did not recall having heard about or did not attend the Career Re-invention training. Due to the small sample size, it is not possible to say whether there are clear geographical differences in communications around training, or in training provision. However, it may be worth Working Wales reviewing their training to ensure that all careers advisers are fully equipped and customers across different regions are receiving similar support.
- 3.24 Stakeholders noted that the internal research undertaken within Careers Wales, prior to the introduction of the MCR, uncovered a need to strengthen careers advisers' understanding of the financial support landscape. It was noted that older workers are more likely to need support relating to their finances, either relating to debt or mortgages or relating to their pension. The Money Guiders training aimed to provide careers advisers with the foundational knowledge to offer basic financial support and signpost customers onto services which could provide specialist financial support.
- 3.25 The majority of careers advisers interviewed had attended the Follow the Money Guiders training. They found the training to be useful in strengthening their understanding of the financial support landscape. Although many noted that the training was supposed to help them start providing basic financial support, every adviser noted that they still would not feel confident offering the support themselves and would still refer customers onto specialist services. Overall, they felt better equipped to send customers to the appropriate support provider, but still felt that offering any support themselves is outside of their remit.
- 3.26 Some careers advisers made specific suggestions for improvements to training and resources for careers advisers. This included providing more advice on supporting older customers who are experiencing the menopause, other age-related health/occupational health issues, and mental health difficulties. The menopause and mental health were identified as increasingly important for staff to understand, given that customers were anecdotally increasingly comfortable disclosing these conditions.

## **Marketing approach**

- 3.27 The Working Wales team developed their marketing approach to better engage prospective audiences with MCR support. Staff and stakeholders outlined that these changes 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.
- 3.28 Careers advisers and stakeholders were positive about the revised marketing approach, suggesting that the new campaign clearly and succinctly engaged people. They thought that the case studies were particularly useful in promoting the service, though some expressed concerns that customers would arrive with very high expectations after seeing these examples.
- 3.29 Social media engagement metrics, compiled during Working Wales' Autumn 2023 media campaign, provide preliminary evidence that this new marketing approach had been more successful than initially anticipated. The campaign reached 9.6% more people than initially planned (1,090,900 vs 1,196,289), with reach being driven more strongly on Facebook than other social media platforms. It was also observed that there was a 133% increase in the number of appointments booked for a MCR during the campaign period (September to November 2023) compared with the previous three months. These results, however, should only be considered as preliminary given that the same data are not available for previous marketing campaigns to use as a comparison.
- 3.30 The term 'mid-career review', or 'career review', was also viewed positively by careers advisers, despite stating that they rarely used it in day-to-day work with customers and partner organisations. Careers advisers noted that giving the MCR 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. Having a specific offer targeted at older adults was thought to increase the acceptability and decrease stigmatisation of seeking careers guidance at any age.

'I think maybe that's where the MCR is useful, giving it that tangible name that it's an active thing that you can come and do. Yes, while what we offer in terms of guidance anyway is quite often covered within the MCR and vice versa, having it as a specific thing that people feel that they can come and do with us should make it easier to market and get people more interested in it.' **Careers Adviser Interview**

- 3.31 Advisers had some suggestions for future marketing campaigns, including trying to address the stigma associated with seeking careers guidance in later life. They thought it would be beneficial to increase community outreach work, specifically alongside employers and training providers, to increase awareness and understanding of the service available.
- 3.32 Advisers also recommended that marketing images should include a more diverse range of demographic groups. There was anecdotal suggestion that current campaigns seemed to focus on older men close to retirement age, and that there should be more images of younger looking women to increase appeal. This was tied to their recognition that customers under 50 often benefitted considerably from MCR support.

### **Profile of Working Wales customers**

- 3.33 An analysis of Working Wales MI sought to understand whether the age distribution of Working Wales customers has changed over the course of delivery, with a particular focus on whether the launch of MCRs (including the marketing approach) at the beginning of 2023 had an influence.
- 3.34 Figure 3.2 shows the age distribution of Working Wales customers that were either full-time, part-time or self-employed when they engaged with Working Wales over three years of delivery<sup>26</sup>. The figure shows that as delivery has progressed there has been a growth in the proportion of customers in the 30 to 39, 40 to 49, and 50+ age groups. It should be noted that the largest growth in the proportion of customers over the age of 30 occurs between 2022 and 2023, however without customer data from previous years, it cannot be compared with changes in the customer profile in

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<sup>26</sup> Note that Working Wales began delivery in 2019, however a change in the customer monitoring system at the start of 2021 means results are only directly comparable for the last three years of delivery.

2019 and 2020. Therefore, it is likely that the Working Wales MCR offer has resulted in a greater number of older employed individuals engaging with Working Wales. However, without further evidence it is not possible to conclude that MCRs, or the marketing of MCRs, are the cause for this growth.

**Figure 3.2: Age distribution of employed Working Wales customers by year**



Source: Working Wales Monitoring Information ((2021, N=4,128), (2022, N=5,192), (2023<sup>27</sup>, N=7,472))

### **Strengths in delivery**

3.35 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 advisers compared MCR's to the midlife MOT website run by the DWP, noting that they felt that the support offered by the latter was less catered towards the specific needs of an individual and more difficult to access for some customer types given its more explicit focus on the 50+ age group. Some thought that approaching the support as an MCR gave structure to the reflective process, while others pointed towards the person-centred nature of service provision as a critical factor in success.

'I had a thank you card before Christmas and they had written in it, "you'll never know how much you've changed my life". They'd gone from being a cleaner to

<sup>27</sup> Note that 2023 only includes customer which initially engaged with Working Wales between January and November, other years include customers from the full calendar year.



going to be a mental health support worker, that's massive. But I think having somebody who believed in them, showed them what training to do and helped them with the applications because their IT skills weren't amazing. We had a lot, a lot of appointments in fairness, but that's where it's life-changing.'

#### **Careers Adviser Interview**

- 3.36 Careers advisers also explained that customers might see very different positive outcomes as a result of receiving a MCR. While a career change is valuable for certain people, for others the support they receive might result in them staying in their current career but pursuing training, progression, or taking a positive new approach to their existing role.
- 3.37 Many of the key strengths in Working Wales MCR delivery were similar to those in general careers guidance, for example, providing impartial support that focuses on the individual's circumstances and support needs, and having the ability to work with customers for longer when needed. Several staff highlighted the Personal Learning Accounts (PLA) as a particularly valuable source of support for customers in supporting them to achieve goals when pursuing a change in career. Other strengths of the service included the staff's non-judgemental approach. In the case of MCRs this was viewed as important in ensuring that people did not feel judged for their age, or for being unable to do a previous job due to life changes.

#### **Challenges and potential areas for improvement**

- 3.38 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 thought that introducing specialist advisers who worked with older customers could be useful, if they were experts in age-related barriers and support needs and could focus on addressing older customers' concerns. However, they also acknowledged that this would be particularly challenging in smaller teams (e.g. those in rural areas).
- 3.39 Some advisers also found it challenging to support customers with high support needs due to limitations on resources. They felt the service could be improved if

they were able to support some customers for longer periods of time, or more intensively.

- 3.40 Finally, it was also noted that there is an ongoing need to build a functioning network of complementary organisations and services that can collaboratively support older people in this space. Key components in this network identified by advisers included PLA, the ReAct+ programme, Age UK, the Communities for Work+ mentoring programme, DWP, the Money Guiders service, and Working Wales.

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

- 4.1 This section reviews evidence from Wales and the UK more broadly about the practice of career reviews. This section will aim to identify any common themes or challenges involved in implementing career reviews as well as good practice in the field.
- 4.2 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. This section has therefore focussed more heavily on the evaluations of projects in England and Scotland with similar aims to Working Wales' MCRs.

### **The ReGrow Project**

- 4.3 Delivered in the south east of England between 2006 and 2008, the ReGrow project was a pilot service providing people over the age of 50 with information, advice and guidance (IAG), mentoring and training<sup>28</sup>. At the time, the project was considered to be one of the largest attempts in the UK to provide guidance to older workers, having provided support to 1,138 older workers. The project was delivered by a partnership of training providers, IAG providers, colleges and a chamber of commerce. The delivery model involved the training providers engaging employers (primarily SMEs) to promote the project who would then refer their employees initially to one of the IAG providers, following at least one IAG session, employees would then be referred to other partners to fulfil any training needs identified.
- 4.4 The evaluation of the ReGrow project found that demand for the IAG services was far greater than initially anticipated while the demand for certain strands of training (namely skills for life training) was lower than expected. Survey evidence from the evaluation showed that the advice and training offered by ReGrow increased roughly a third of participants' likelihood to engage in further training and stay longer

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<sup>28</sup> [Stephen McNair, Strengthening the older workforce: an evaluation of the ReGrow Project in the South East Region](#), December 2008.

in work. Furthermore, roughly 20% of respondents noted that they were more likely to try and change jobs. The evaluation concluded that the ReGrow project had been a success, noting that the support had been welcomed by both employers and employees, and that there had been very high demand for both IAG support, and a majority of the training courses offered.

4.5 Some of the key issues identified by the evaluation as needing further study are as follows:

- Understanding of IAG: The evaluation found that both employer and employee reception of the IAG support was incredibly positive, however it was noted that this may have been skewed by very low initial expectations. It was noted that many employers and employees initially assumed the IAG support to be a preliminary to the training, suggesting that many did not understand the broader potential of the IAG support itself.
- Low demand for basic skills training: The project's initial remit dedicated considerable resource to the provision of basic life skills training, as prior research had identified that older workers were less likely to have these kinds of qualifications, and if redundant, were less likely to be re-employed due to poor basic skills. However, the evaluation noted that there was lower demand than expected for basic skills training and further research would be needed to understand why this demand was low, despite an identified skills gap.
- Training demand: Older workers were most positive about training that lasted a day, with more negative responses for training that took more or less time.
- Advertising and availability: Many participants noted that many more people would have benefitted from the support offered by ReGrow if they did not need to be referred by their employer. It was also noted by participants that the project would have been more impactful had it been advertised more widely.

#### **Mid Life Career Review Pilot Project**

4.6 Following the reported success of the ReGrow project, the Department for Business Innovation and Skills (at the time) in 2013 agreed to fund The National Institute of Adult Continuing Education (NIACE), partnering with the National Career Service,

Unionlearn and other agencies, to undertake a larger scale trial of career reviews for older workers. The pilot project also aligned with the UK Government's policy paper '[Fuller Working Lives: a framework for action](#)', which aimed to extend people's working lives and improve retirement decision making.

- 4.7 The pilot project consisted of 17 delivery partners covering a wider geographic area, it was therefore agreed at the start of the pilot that the partners would agree on a consistent set of objectives but develop their own delivery methods based on their needs and the needs of their clients. The evaluation of the Mid Life Career Review pilot<sup>29</sup> noted that this meant that delivery approaches adapted over the lifetime of the pilot as their experience and understanding of the challenges faced by clients grew, allowing partners to meet client needs more effectively. Just over half of the sessions (52%) were delivered face-to-face, and a third (34%) were delivered in group sessions, the remainder were delivered either over the phone or via email. Although there wasn't a single delivery model, it was noted that each review took a person-centred approach which encompassed their employment and learning needs, but also considered their broader life circumstances like their family, health, caring responsibilities, financial circumstances, aspirations and motivations.
- 4.8 The evaluation noted that the scheme has been successful in achieving a wide range of positive impacts including improving confidence, increasing uptake in training, motivating participants to search and apply for jobs, and supporting people to access further IAG support. Due to the wide range of delivery models, the evaluation could not reach a firm conclusion on the most cost-effective way to deliver the mid-life career reviews, however the average cost per client (including set up, management and training costs) was roughly £100.
- 4.9 The evaluation concluded that there was a clear demand for the mid-life career reviews, though many participants were initially surprised that this kind of support was available. Although the evaluation highlights that there is no single review model which will suit every type of person, evidence from the pilot indicates that the

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<sup>29</sup> [NIACE, Mid Life Career Review Pilot Project Outcomes: Phases 1, 2 and 3](#), July 2015.

majority of people would be best served by a well-facilitated group workshop with peers<sup>30</sup>, followed by a face-to-face one-to-one session(s) with a trained adviser.

4.10 The evaluation also compiled a list of the components a mid-life career review for both employed and unemployed clients should include, encouraging clients to:

- Understand their life expectancy, and its implications for work, leisure, finance and health, noting that many people in mid-life substantially underestimate their life expectancy.
- Review their aspirations for work and life and how they may change in the coming decades.
- Make a more informed decision about when to retire, the evaluation notes that working for longer is likely to improve the quality of life of most people, as well as being good for employers and the economy as a whole.
- Undertake training which is likely to sustain them longer in rewarding activity.
- Review the implications of working longer on their health, and explore support from their employer or other agencies, or options in other kinds of work if necessary.
- Review their long-term financial situation and seek appropriate support for financial and retirement planning.
- Consider and develop strategies for overcoming age discrimination in the workplace or when seeking new employment.
- Understand their rights in relation to issues including retirement timing, flexible working, and caring responsibilities, and to develop realistic strategies for negotiating adjustments to their working patterns.
- Realistically assess options for job change and self-employment.
- Develop the skills and knowledge to negotiate the outcomes which they would prefer.

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<sup>30</sup> Although 'peers' were defined differently by different delivery partners, one positive example highlighted by the evaluation was grouping people with similar characteristics or experiences, aligning with existing groups within the community, like carers, newly redundant professionals, women or clients with mental health issues.

4.11 Another key finding which may inform best practice related to the way in which these kinds of schemes should be branded. The evaluation notes that the initial conception for the pilot project was named 'Review at 50', however it was deemed to be too restrictive and renamed to 'mid-life career review'. It was noted that in hindsight, both the terms 'mid-life' and 'career' could be interpreted very differently from their intended use. Many people did not identify themselves as in 'mid-life' despite being in the 50+ target group. Participants' definition of 'career' was often far narrower than the service's definition, defining career guidance as the process of being slotted into the jobs market, as opposed to a broader discussion about all life decisions. The evaluation concludes that further research is needed to understand what kind of branding is most likely to be effective, and crucially, with which groups of people.

#### **Creating a 'Career MOT at 50'**

4.12 Building on the conclusions of the mid-life career review project delivered by NIACE, the charity Age UK also suggests some key components which should make up a career review for people in mid-life<sup>31</sup>. The paper emphasises that pensions advice, with a clear focus on encouraging continued saving, should be a key component of a 'career MOT at 50'. The paper notes that there is a high demand for this kind of service, with nearly half of surveyed adults (48%) would want to discuss their pension as part of a career review. One of the key recommendations of the paper is that this advice should be rolled out at 50 while people are likely to still be accumulating their pension, emphasising that the advice may be too late if delivered to people in their late 50s or 60s.

#### **50+ Back to Work Evidence Review**

4.13 Commissioned by the Department for Work and Pensions (DWP) in 2010, this evidence review undertaken by the Centre for Ageing Better aimed to provide a greater insight into how the DWP's back to work provision supports over 50s' return to work<sup>32</sup>. Although this programme includes a wider array of interventions beyond

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<sup>31</sup> [Age UK, Creating a 'Career MOT at 50'](#), October 2017.

<sup>32</sup> [Centre for Ageing Better, Employment support for over 50s: Rapid evidence review](#), June 2019.

career reviews, the evidence review included some findings and conclusions specifically relevant to advisory support and career reviews.

4.14 Some of the key findings in the review that related to career reviews for older workers included:

- Having an adviser of a similar age is considered to be an asset to the advisory relationship.
- Older people looking for professional or managerial work were less likely to find advisory services helpful.
- Mixed age employability support programmes frequently distinguished people over the age of 50 as more likely to have a health condition or disability which restricted engagement with these services.

### **Research of Older People and Employment in Scotland**

4.15 Research commissioned by the Scottish Government in 2017 sought to examine the attitudes and issues surrounding an older workforce<sup>33</sup>. The qualitative study collected data from both workers over the age of 50 and a range of employers in different sectors. Both employers and employees identified a range of benefits and challenges associated with later working life. In terms of benefits, it was highlighted that in many cases extending working life brought health benefits to the worker (namely physical activity and social contact) as well as ensuring that vital knowledge and experience was retained within an organisation. The main challenges raised related to an inequality of opportunities between different groups of older workers, with some workers finding it more difficult to negotiate flexible hours or decide when they wanted to leave the labour market due to the nature of their roles and their financial position.

4.16 The research also found that there was a widespread lack of knowledge amongst participants about their own pension provision, this was true of state, private and occupational pensions. Several study participants also expressed that they would like to continue working in some capacity beyond retirement, although part-time

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<sup>33</sup> [Scottish Government, Older people and employment in Scotland: research](#), August 2017.



work was considered to be a viable avenue to continue working, concern was expressed about a perceived lack of good quality part-time work.

### **Relevance to the delivery of MCRs**

- 4.17 Some key documents included in this review set out some effective practice in terms of the topics that should be covered within an MCR, these topics include health, aspirations, retirement, finances and challenges in the workplace. Working Wales' broad and tailored support seems well suited to ensure all these topics can be covered based on the needs of a customer.
- 4.18 As highlighted in some of the interviews with careers advisers, developing a stronger network which includes support organisations with specialities in areas like financial support, occupational health and mental health may serve to improve Working Wales' overall offer moving forward. The literature emphasises that older workers in particular are more likely to face 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.
- 4.19 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. It is therefore important that awareness and recognition of the value of this offer continues to grow. Changes in Working Wales' marketing approach, that have been made to accompany the roll-out of MCRs, may contribute to changing the perception around careers guidance.
- 4.20 The desk review undertaken as part of this research did not uncover a large body of literature from the UK around the delivery and best practice relating to MCRs. There is potentially space for a programme like Working Wales to take a leading role in understanding and outlining good practice for career reviews for workers of all ages. There is likely scope in this area to undertake research focussed on outcomes and impacts which could set a strong example for practice.

## 5. Reviewing the practice of Career Reviews internationally

5.1 This section reviews evidence from outside the UK about the practice of career reviews. It aims to identify any common themes or challenges involved in implementing career reviews as well as good practice in the field.

### Work Ability Model

5.2 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>34</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.

5.3 The Model is best described as a building with several floors which represent different influences, each floor supports the next with Work Ability representing the roof of the building<sup>35</sup>.

- First/Ground floor: This represents physical, psychological and social health. The weight of the rest of the building rests on this floor.
- Second Floor: This floor represents the professional knowledge and competence, or skill used to meet the demands of work life. Changes in work challenges and demand mean that continuous development is an important component of Work Ability.
- Third Floor: This represents a person's values, attitudes and motivation as well as the relationship between work and personal life. This floor is open to a wide array of influences, of note, societal or legislative changes (e.g. pension reform) would be reflected here.
- Fourth Floor: Considered to be the heaviest floor which is supported by the other floors, the fourth floor represents work and its related factors. Special attention on this floor is given to supervision and management, which has a mandate to organise and change the floor if needed.

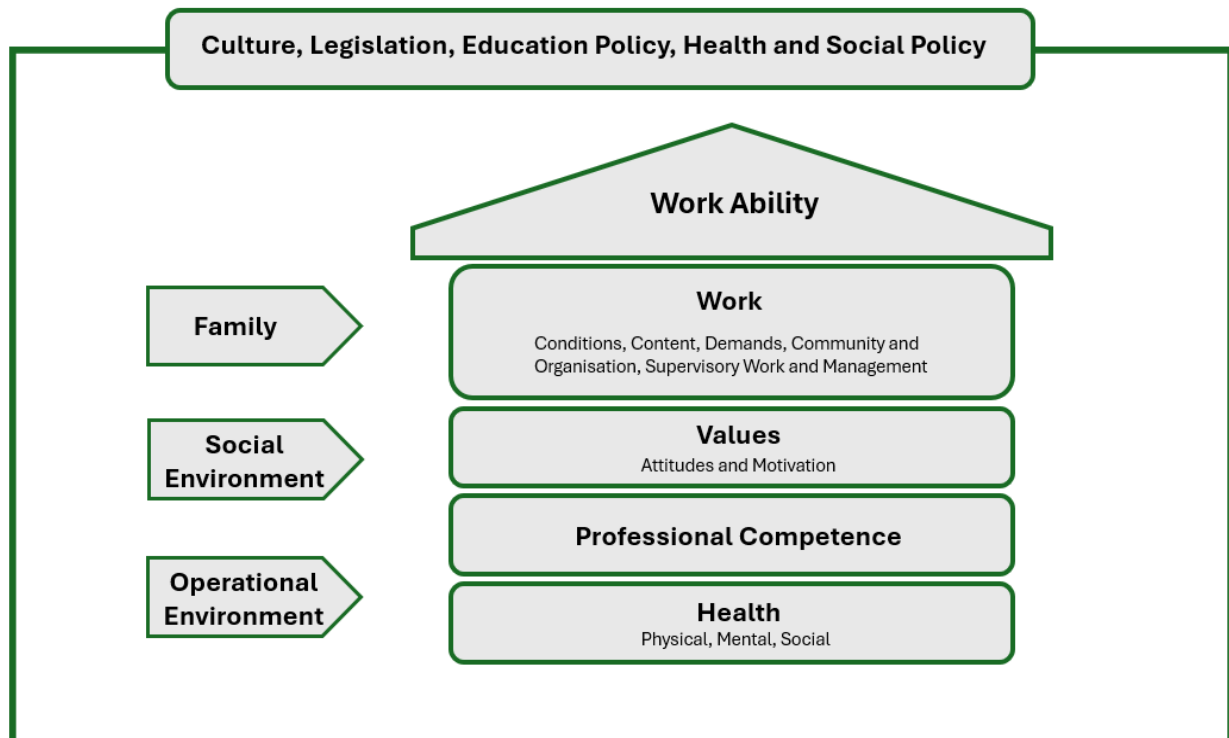
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<sup>34</sup> [Comcare, The Work Ability Approach](#), August 2013.

<sup>35</sup> [J Ilmarinen, Towards a longer work life! Ageing and the quality of work in the European Union](#), 2005.

- The roof of the building represents Work Ability, which is therefore built on a balance of a person's resources and their work demands. Ilmarinen notes that Work Ability is the most important asset in a person's work life since enterprise profits are made possible by the work ability of its employees.

**Figure 5.1: The Work Ability Model**



© Finnish Institute of Occupational Health, 2010

### Work Ability Index

5.4 Derived from this model, different versions of a Work Ability Index (WAI) have been created to measure someone's work ability, usually measured through a self-assessment survey as part of an occupational health assessment. An expert paper submitted to the National Institute for Health and Care Excellence (NICE) provides an overview of some of the advantages and disadvantages associated with this approach<sup>36</sup>.

<sup>36</sup> [J Crawford, Expert Paper: Work Ability model and index](#), 2016

- 5.5 Citing research by Von Bonsdorff et al (2011)<sup>37</sup>, the expert paper notes that the WAI used in mid-life can help identify those most at risk of workplace disability later in life. Analysis of a longitudinal study of over 2,800 Finnish workers over the course of 28 years, which included the WAI questionnaire, found that poor work ability in midlife (defined as 44 to 58 years old in this study) was a predictor for a decline in health for both men and women in white and blue collar industries. The study found that for both blue and white collar workers, the risk of death or disability at the final 28 year follow-up was threefold among men and twofold among women who had indicated moderate work ability in their midlife compared with white collar employees reporting excellent work ability at midlife.
- 5.6 The main criticisms of the WAI relate to its application in occupation health as opposed to career guidance, noting that it can only be used as a tool to identify groups or individuals who are having difficulty at work, and should not replace fitness to work or other occupationally related examinations. It was also noted that in studies where participants were given some kind of intervention (e.g. physical exercise and training (Perkiö-Mäkelä, 2005) or consultations with an occupational health physician (Van der Berg et al, 2009)), the WAI did not change in any statistically significant way between the respondents' pre- and post-intervention survey.
- 5.7 In terms of its applicability in the UK, Coomer and Houdmont (2013)<sup>38</sup> found that in their survey of 436 occupational health practitioners that 39% were aware of the WAI, but only 7% reported using it, suggesting a lack of training in the UK. The authors also highlight that Work Ability is very firmly embedded with Finnish occupational health practice and is a widely understood term among practitioners as well as those receiving assessments. The final consideration highlighted by the authors related to data handling, noting that additional safety processes may need to be adopted to handle sensitive health data collected by WAI questionnaires.

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<sup>37</sup> [Mikaela Von Bonsdorff et al, Work Ability in midlife as a predictor of mortality and disability in later life: a 28-year prospective follow-up study](#), March 2011.

<sup>38</sup> [Karen Coomer and Jonathan Houdmont, Occupational health professionals' knowledge, understanding and use of work ability](#), September 2013.

### **Emotional well-being following a later life career change**

- 5.8 Although not directly related to MCRs, research by Vogelsang et al (2018)<sup>39</sup> touches on many of the aspects which are reviewed as part of an MCR delivered by Working Wales and seeks to understand how they relate to well-being. Using a survey of 337 older workers in the USA that have undergone a career change in later life, the authors seek to understand which factors or characteristics before the career change correlate with positive well-being outcomes after the change. The strongest factor which associated with positive emotional outcomes after a career change was financial resources during the transition. Family support and intentionality were also associated with positive emotional outcomes following a career change. The authors also found that prior job prestige and purposeful job training had no association with subsequent well-being. Furthermore, a meta-analysis of 418 empirical studies conducted by Ng and Feldman (2012) also found that older workers were less likely to undertake training<sup>40</sup>.
- 5.9 Metrics related to well-being were also shown to be some of the strongest drivers for people to remain in a certain job (Ang, 2021)<sup>41</sup>. When workers over the age of 50 were surveyed about the main motivations for remaining in their jobs, the three most commonly cited reasons were: their relationship with their colleagues, good work-life balance and a perception that they were being treated fairly in the organisation.

### **Relevance to the delivery of MCRs**

- 5.10 The literature showcases some key areas where support from Working Wales can bring added value. The literature has highlighted the importance of financial security and intentionality to the success of career transitions, both of these are areas the MCRs' tailored offer has the potential to enhance.
- 5.11 Additionally, 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. Implementing

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<sup>39</sup> [Eric Vogelsang, Ken Shultz and Deborah Olson, Emotional Well-Being Following a Later Life Career Change: The Roles of Agency and Resources](#), January 2018.

<sup>40</sup> [Thomas Ng and Daniel Feldman, Evaluating Six Commons Stereotypes About Older Workers with Meta-Analytical Data](#), August 2012.

<sup>41</sup> [Amberlyce Ang, Late-Career Planning and Job Crafting for Older Workers](#), March 2021.

practice like the WAI may also 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.

## 6. Conclusions and recommendations

- 6.1 MCRs were first announced at the end of 2022 following a policy commitment within ['Stronger, Fairer, Greener Wales: A Plan for Employability and Skills'](#) 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'.
- 6.2 This research aimed to understand how MCRs were currently being delivered by Working Wales, what kind of evidence existed in Wales, the UK and internationally on good practice for career reviews and whether the 50+ age group was an appropriate target group for this kind of service.
- 6.3 The identification of the Working Wales career review offer within ['Stronger, Fairer, Greener Wales: A Plan for Employability and Skills'](#) demonstrates the valuable contribution this support has made to those aged 50 and over to proactively consider their career. Prior to the explicit introduction of MCRs in 2023, the career review approach through Working Wales was developed through the careers guidance offer and aimed to take a tailored approach when supporting Working Wales' customers by understanding their current situation, their challenges, needs and aspirations. 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 to specifically target an older age group and provided training opportunities to careers advisers to further develop their awareness around financial support and signposting.
- 6.4 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. Instead, it is an enhanced offer, with staff having developed greater financial

awareness skills and the additional Morrisby psychometric tests available as an additional resource.

- 6.5 Interview testimony, as well as evidence presented in evaluations of similar programmes in the UK, show that workers often benefit from a career review more than they initially anticipate. It has been suggested that many workers often hold a misconception that careers guidance is only beneficial to young or unemployed people, or that careers guidance is simply a step on the path to securing training. 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.
- 6.6 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 some advisers and the broader literature note that older workers are more likely to exhibit certain needs (namely relating to financial/pension support and understanding their transferable skills), the design of the MCR is well suited to address those needs as well as any needs which are more likely to be expressed by younger workers. Overall, the offer of a 'career review' is seen to be beneficial for a broad array of customers and should continue to be available to workers of all ages.
- 6.7 Good practice reviewed as part of this research appears to generally align with Working Wales' current MCR provision. Careers advisers acknowledge the broad range of factors that can impact on an individual's work life, aligning with a body of literature that emphasises the need to account for a wider work, social and health context when supporting customers. Best practice outlined in the evaluation of the Mid-Life Career Review in England noted that career reviews should be delivered by qualified advisers. Since its inception in 2019, Working Wales has followed this practice ensuring all their advisers are level 6 qualified. The literature has also highlighted some common needs among workers undertaking a review that outline



clear areas where Working Wales' MCRs can provide added value, namely in terms of intentionality (supporting workers to identify a desirable career path) and signposting customers to appropriate support organisations, including financial and pension support.

- 6.8 Advisers were broadly positive about the training they had received in preparation to deliver the MCRs. The Money Guiders training was perceived as useful as it allowed careers advisers to feel better informed about a range of financial support options and, as a result, better able to effectively signpost customers to qualified support.
- 6.9 Advisers generally found the Morrisby psychometric test 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, careers advisers also reported that the test could be of limited value if not completed alongside expert careers guidance. The Morrisby test results do not account for labour market intelligence and could, theoretically, recommend career paths for customers that aren't necessarily realistic when taking a holistic understanding of their individual situation into account. As a result, 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. Additionally, as the Morrisby test is not available through the medium of Welsh, it is not accessible to all Working Wales customers. Analysis of the MI found that 563 unique customers undertook a Morrisby test with Working Wales in 2023. This indicates that despite its value for those specific customers, it is not a crucial component of career reviews.
- 6.10 The research did not uncover a large body of literature relating to the delivery, impacts and good practice of career reviews. A free at the point of use programme like Working Wales seems well placed in terms of its scale to set the standard moving forward for MCRs. There is scope to amend and improve monitoring processes to develop a stronger understanding of the impacts of career reviews on employed customers as well as develop a robust body of evidence detailing good practice for workers of different ages and needs. Greater evidence directly from

Working Wales on the impact of MCRs would consolidate its position as setting the standard for MCRs more widely.

### **Recommendations**

- 6.11 Based on the evidence collected in this research, the following recommendations have been identified to aid and improve future delivery of MCRs:
- 6.12 **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 'MCRs' 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 also 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.
- 6.13 **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.
- 6.14 **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.
- 6.15 **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 received 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.

- 6.16 **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 Stronger, Fairer and Greener Wales.

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## **Annex B: Literature review protocol**

### ***Search Strategy***

The team firstly completed a comprehensive and systematic search of existing literature, including more applied outputs as well as academic research on MCRs within employability support. This included searching electronic databases, scanning relevant papers and contacting relevant organisations, individuals and academics. The objective was to ensure the full range of best practice evidence is captured within the review.

Electronic databases were searched using a predefined search string. To ensure the search was sensitive to the full breadth of eligible literature, no methodological or contextual filters were applied. The databases that were searched included:

- JSTOR
- Educational Resources Information Centre
- British Library Public
- Google Scholar
- Wiley Online Library
- Ingenta Connect
- Third Sector Knowledge Portal
- Online Information Review, and
- Taylor & Francis Online.

In order to complement database searches, the review team also manually searched relevant journals and libraries to conduct reverse citation mapping of key texts. The team also asked external stakeholders to highlight any good practice MCR research that may be relevant to the review.

### ***Key terms***

- Mid-life career change
- Mid-life career review
- Mid-career change
- Mid-career transitions
- Mid-career review
- Career change
- Career change advice
- Career change guidance
- Career change review
- Career change transitions
- Career switch
- Return to work career guidance
- Careers guidance for older people.

### **Appending terms added to key terms**

- What works
- Good practice
- Effective delivery
- Best practice.

### **Screening**

Once the search was complete, potentially relevant material was be screened against the predefined inclusion and exclusion criteria outlined below.

This review was concerned with identifying good practice methods of delivering MCRs.

Relevant documents included:

- Studies that focus on the delivery of MCR advice and guidance.
- Studies that focus on the delivery of MCRs for a range of age groups.<sup>42</sup>
- International examples of MCRs where ‘quality’ evidence is provided.
- Studies that provide evidence of the effectiveness of MCRs in prompting positive change that stakeholders can draw from to inform policy.
- Formal research (i.e. subject to a clear research methodology and process).
- Informal published material (i.e. grey literature) with reference to the ‘quality’ of the evidence.

To ensure that the literature review remained focus and in scope, the following were excluded:

- Studies that report on MCR practice that does not have a clearly stated purpose.
- Soft evidence (i.e. primary commentary or anecdotal evidence).
- Studies that report solely on evidence of satisfaction derived from the delivery of mid-career review processes with limited or no detail regarding the MCR process.
- Studies not published in English or Welsh.

Based on literature titles, 65 documents were initially screened. Following a review of these documents’ abstracts, executive summaries and conclusions, 42 documents remained.

Following a full screening of their content, the team determined that 27 documents (listed in Annex A) adhered to the screening criteria.

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<sup>42</sup> It is however acknowledged that the review placed a particular focus on mid-career reviews for individuals over the age of 50.

### ***Data Extraction***

Literature that was screened against the predefined inclusion criteria was reviewed, with any information on best practice methods extracted.

### ***Critical Appraisal***

Where evidence was collected through the data extraction process, researchers explored the robustness of the evidence captured. Data would then be appraised to:

- Explore the range of methods utilised within MCRs.
- Explore the extent to which MCRs are focussed on individuals aged 50 and over and the importance of this.
- The perceived importance and impact of MCRs.
- Assess potential challenges of adopting specific MCR delivery models.
- Consider the applicability of other MCR models in Wales.

### ***Trend Mapping***

As a result of the literature review and other information gathered through staff and stakeholder consultations, the researchers then sought to draw out trends. This included areas of established or emerging good practice, as well as features or approaches that have successfully navigated the challenges of delivering MCR.



## **Annex C: Discussion guide used in interviews with advisers and management staff**

### **Career Adviser Discussion Guide**

#### ***Background***

Wavehill are undertaking research on behalf of Welsh Government into the current and future provision of the MCR within Working Wales.

The information gathered as part of this research will be used to help Welsh Government understand the current practice adopted to deliver MCRs and will inform future delivery.

People taking part in the research have been identified by the team at Careers Wales or Welsh Government officials as individuals with knowledge of the current management and delivery of the MCRs within Working Wales. Participation in the research is voluntary. If you decide to take part in the interview, you can change your mind at any point and can choose to not answer certain questions if you prefer.

If you have any questions, please contact Anna Burgess at [anna.burgess@wavehill.com](mailto:anna.burgess@wavehill.com).

#### ***Confidentiality***

Any personal information collected as part of the research is kept confidential. Your answers to the interview will not be made public in a way that could lead to you being identified.

Please note that personal data will only be viewed by the Wavehill research team. Any information shared with the Welsh Government will be anonymised. The information is only used for research purposes.

Under UK GDPR data protection legislation, you have the right:

- To access your personal data held by Wavehill.
- To require Wavehill to correct any mistakes in that data.
- To (in certain circumstances) object to or restrict processing.
- For (in certain circumstances) your data to be 'erased'.

Please contact Anna Burgess at [anna.burgess@wavehill.com](mailto:anna.burgess@wavehill.com) if you wish to do any of these things.

### ***Introduction***

1. As an introduction, could you briefly describe your role and how it relates to the Working Wales mid-career reviews?
2. What is your understanding of what a mid-career review is?
  - a. In your view, what are the critical elements of a mid-career review?

### ***Service demand***

3. To the best of your knowledge, what is the current demand for mid-career reviews within Working Wales? Prompt: Is there a customer need for mid—career reviews?
  - a. Are you aware of any other mid-career review support across Wales?

### ***Process***

4. Does the mid-career review support differ from the previous support you offered around career reviews?
  - a. Does this support vary by customer age?
5. Please tell us how you determine whether a customer should undertake a mid-career review?
6. Do partners currently refer customers to you specifically for a mid-career review?
7. In your opinion, how useful is the Morrisby psychometric test when conducting a mid-career review? Please explain your answer.

### ***Programme-level reporting and support***

8. When reporting on customer engagement:
  - a. How do you document when a customer has undertaken a mid-career review?
  - b. How do you document a customer's next steps after their mid-career review?
9. In your opinion, how useful was the following:
  - a. The career re-invention webinar training support offered by Careers Wales.
  - b. The 'Follow the Money Guiders' programme training.
10. Did you receive any other support or training around mid-career reviews? This may include informal training from another member of staff or formalised training around mid-career reviews.

11. Is there any additional support and/or training that would support you to better offer mid-career reviews?

***Reflections and next steps***

12. In your opinion, how beneficial are the mid-career reviews for customers? Please provide details.

13. Reflecting on the delivery model, what are the key strengths of the current practice of how mid-career reviews are offered through Working Wales?

14. Are there any key challenges faced with the approach taken to offer mid-career reviews?

Prompt: If so, how could these challenges be overcome?

15. How, if at all, could the Working Wales mid-career review offer be improved?

***Close***

16. Is there anything else you would like to say about the mid-career reviews that we haven't covered?

Prompt: Is there anything in particular you would like us to look at within this research?

***Thank you for your time***

## **Stakeholder Discussion Guide**

### ***Background***

Wavehill are undertaking research on behalf of Welsh Government into the current and future provision of the mid-career review within Working Wales, the Welsh Government's national impartial, professional, careers and employability support service.

The information gathered as part of this research will be used to help Welsh Government understand the current practice adopted to deliver mid-career reviews and will inform future delivery.

People taking part in the research have been identified by the team at Careers Wales as individuals with knowledge and insight around mid-career reviews. If you decide to take part in the interview, you can change your mind at any point and can choose to not answer certain questions if you prefer.

If you have any questions, please contact Anna Burgess at [anna.burgess@wavehill.com](mailto:anna.burgess@wavehill.com).

### ***Confidentiality***

Any personal information collected as part of the research is kept confidential. Your answers to the research will not be made public in a way that could lead to you being identified. Please note that personal data will only be viewed by the Wavehill research team. Any information shared with the Welsh Government will be anonymised. The information is only used for research purposes.

Under the new data protection legislation, you have the right:

- To access your personal data held by Wavehill.
- To require Wavehill to correct any mistakes in that data.
- To (in certain circumstances) object to or restrict processing.
- For (in certain circumstances) your data to be 'erased'.

Please contact Anna Burgess at [anna.burgess@wavehill.com](mailto:anna.burgess@wavehill.com) if you wish to do any of these things.

## ***Introduction***

1. As an introduction, could you briefly describe your role and how it relates to the Working Wales mid-career reviews?

## ***Best practice models***

2. What is your understanding of what a mid-career review is?
3. In your view, what are the critical elements of a mid-career review?
  - a. Are there any specific aspects of the review that are particularly important within the Welsh context?
4. With the exception of Working Wales mid-career reviews, are you aware of any other mid-career review support available across Wales? Please provide details.
5. To help inform the Working Wales approach, are you aware of any good practice examples of mid-career reviews:
  - a. Across Wales
  - b. Across England, Northern Ireland and/or Scotland
  - c. Outside of the UK
6. [If involved in the design of the Working Wales mid-career review] Based on your knowledge, is there any specific training that staff should undertake to effectively deliver mid-career review support?

## ***Reflections***

7. Currently, customers need to be over the age of 50 to undertake a mid-career review with Working Wales. In your opinion, is this age bracket appropriate?
  - a. If not, what would an appropriate age bracket be?
8. In your opinion, what other key indicators should be identified in order to offer a mid-career review?
9. [If involved in the design of the Working Wales mid-career review] Based on your knowledge of the offer, to what extent does the current Working Wales mid-career review align with offer best practice models?
  - a. Are there any gaps in this current offer?
10. [If involved in the design of the Working Wales mid-career review] In your opinion, are there any key barriers or risks that may mitigate the success of the Working Wales mid-career review offer?

11. [If involved in the design of the Working Wales mid-career review] How, if at all, could the Working Wales mid-career review offer be improved?

12. As part of this research, Wavehill are looking at best practice methods of offering mid-career reviews. Is there anything in particular, you would like us to be looking at?

**Close**

13. Is there anything else you would like to say about mid-career reviews that we haven't covered?

***Thank you for your time***

## **Annex D: Privacy notices**

### **Research into Working Wales Mid-Career Reviews – interviews with Working Wales management and delivery staff**

The Welsh Government has commissioned Wavehill to undertake research into Working Wales mid-career reviews. The aim of this research is to:

- Examine and consider the initial evidence on the introduction of mid-career reviews by the Working Wales service,
- Provide an overview of evidence from Wales, the UK and internationally on the practice of mid-career reviews.

As part of this research, Wavehill will be gathering information on the introduction of mid-career reviews by the Working Wales service through interviews with Working Wales management and delivery staff.

The Welsh Government is the data controller for the research. However, Wavehill will delete any personal data provided through the interviews, and anonymise the raw data, before it is shared with the Welsh Government.

The information collected during the project will be included in a report published on the Welsh Government website and possibly in other publications by Wavehill and Welsh Government.

Your participation in this research is completely voluntary. However, your views and experiences are important in order to help inform Welsh Government policies.

The contact for this research at Wavehill is Oliver Allies

E-mail address: [oliver.allies@wavehill.com](mailto:oliver.allies@wavehill.com)

## PRIVACY NOTICE

### What personal data do we hold and where do we get this information?

Personal data is defined under the UK General Data Protection Regulation (UK GDPR) as 'any information relating to an identifiable person who can be directly or indirectly identified by reference to an identifier'.

Wavehill have received your contact details (name, email address and, where available, telephone number) either from:

- Welsh Government in the case of Working Wales management staff. The Welsh Government hold your details as part of the management of the Working Wales service; or
- Careers Wales in the case of Working Wales advisers, who hold your details as part of their role in delivering the Working Wales service on behalf of the Welsh Government.

Wavehill will only use email addresses and telephone numbers for the purposes of this research.

Participants will be invited via email to take part in a MS Teams interview. If no response is received, Wavehill may send out another reminder email or, where information is available, contact participants via telephone. You can choose to take part in an interview over the phone and provide your telephone number to do so, if Wavehill have not already received this from Welsh Government or Careers Wales.

In all instances, your participation is voluntary. If you do not wish to take part or be sent reminders, then please reply to the invitation email or let us know using the telephone number provided and your details will be removed.

You are not required to provide any additional personal data as part of the interview, with the exception of your image if you agree to an MS Teams interview being video recorded. We wish to record MS Teams interviews for operational reasons. We will make this clear to you before the interview begins, and you will have the opportunity to tell us if you are not happy for the discussion to be recorded. If interviews are recorded, personal data will be removed during the process of transcribing. Recordings will be deleted as soon as this



process is completed. If discussions are not recorded, personal data will not be included in written notes prepared during or following the interviews.

If you raise a query or complaint and provide personal data requesting a response, the researcher will forward the request only to the relevant official and subsequently delete it from the research data.

### **What is the lawful basis for using your data?**

The lawful basis for processing information in this data collection exercise is our public task; that is, exercising our official authority to undertake the core role and functions of the Welsh Government.

Participation is completely voluntary. Research studies such as this are important for the Welsh Government to collect information and actionable evidence about its ability to deliver government priorities. The information collected in this research, for example, might be used to provide recommendations on the future practice of mid-career reviews.

### **How secure is your personal data?**

Personal information provided to Wavehill is always stored on a secure server. The data can only be accessed by a limited number of researchers working on this project. Wavehill will only use this data for research purposes. Wavehill has cyber essentials certification.

Wavehill has procedures to deal with any suspected data security breaches. If a suspected breach occurs, Wavehill will report this to the Welsh Government who will notify you and any applicable regulator where we are legally required to do so.

Wavehill will use the information gathered to produce a report that will be published on the Welsh Government website. This report will not include any information that could be used to identify individual participants.

### **How long do we keep your personal data?**

Wavehill will hold personal data during the contract period, and any personal data not already removed will be deleted by Wavehill within three months of the end of the contract. This includes your contact details.

## **Individual rights**

Under UK GDPR, you have the following rights in relation to the personal information you provide as part of this research project, specifically you have the right:

- To access a copy of your own data;
- For us to rectify inaccuracies in that data;
- To object to or restrict processing (in certain circumstances);
- For your data to be 'erased' (in certain circumstances); and
- To lodge a complaint with the Information Commissioner's Office (ICO) who is our independent regulator for data protection.

The contact details for the Information Commissioner's Office are: Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF. Phone: 0303 123 1113. Website: [www.ico.org.uk](http://www.ico.org.uk)

## **Further Information**

If you have any further questions about how the data provided as part of this study will be used by the Welsh Government or wish to exercise your rights using the UK General Data Protection Regulation, please contact:

Name: Sean Homer

E-mail address: [KASEmployabilityandSkillsResearch@gov.wales](mailto:KASEmployabilityandSkillsResearch@gov.wales)

The Welsh Government's Data Protection Officer can be contacted at:

Welsh Government, Cathays Park, Cardiff, CF10 3NQ, Email:

[DataProtectionOfficer@gov.wales](mailto:DataProtectionOfficer@gov.wales).

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- Provide an overview of evidence from Wales, the UK and internationally on the practice of mid-career reviews.

As part of this research, Wavehill will be gathering information on the introduction of mid-career reviews by the Working Wales service through interviews with stakeholders.

The Welsh Government is the data controller for the research. However, Wavehill will delete any personal data provided through the interviews, and anonymise the raw data, before it is shared with the Welsh Government.

The information collected during the project will be included in a report published on the Welsh Government website and possibly in other publications by Wavehill and Welsh Government.

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- For us to rectify inaccuracies in that data;
- To object to or restrict processing (in certain circumstances);
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