



Department  
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**GMCA** GREATER  
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 CENTRE FOR  
**AGEING  
BETTER**

# **Employment support for over 50s: Technical report of the rapid evidence review for the Centre for Ageing Better**

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June 2019

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# About the Centre for Ageing Better

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The Centre for Ageing Better is a charity, funded by an endowment from The National Lottery Community Fund, working to create a society where everyone enjoys a good later life. We want more people to be in fulfilling work, in good health, living in safe, accessible homes and connected communities. By focusing on those approaching later life and at risk of missing out, we will create lasting change in society. We are bold and innovative in our approach to improving later lives. We work in partnership with a diverse range of organisations. As a part of the What Works network, we are grounded in evidence.

# Foreword to the Technical Report

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In September 2018, the Centre for Ageing Better (Ageing Better) asked P&A Research and Consulting (P&A) to conduct a rapid evidence review (RER) of employment support for older people. This aimed to inform Ageing Better, The Department for Work and Pensions (DWP), Greater Manchester Combined Authority (GMCA), and other partners<sup>1</sup> about the scope and possible focus for future place-based initiatives for supporting people aged 50 and over back into work in Greater Manchester (GM). A full report of findings was subsequently produced on the first phase of the work and has been published by Ageing Better.

By its nature an RER identifies, assesses and reviews a wide range of evidence, in this case over 100 published sources from 2010 alone, and some earlier synthesis studies. The first draft report of the RER provided important source evidence in a series of detailed annexes to that report. For simplicity and economy those 'technical' annexes have been omitted from the final published report but are provided here in a supporting Technical Report of the study for:

- Section A: RER scope, search strategy, and evidence reduction methodology
- Section B: Consulted sources (2010>) – Phase 1 Review of Content and Relevance to the RER
- Section C: 50+ Employment Support Rapid Evidence Review – Extended Matrices
- Section D: Evidence Fiche's.

Sections B and C are broken down for each major source for: academic and related studies; governmental sources; professional and institutional sources; and international sources.

The technical report needs to be read as a supplement to the main report and its findings. A short preface is presented for each section to introduce the content and its structure.

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February 2019

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1 The partners to Ageing Better for this study are: Greater Manchester Combined Authority (GMCA), Department for Work and Pensions (DWP), Job Centre Plus (JCP), Ministry of Housing, Communities & Local Government (MHCLG) and Department for Education (DFE)

# Section A: RER scope, search strategy, and evidence reduction methodology

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## Introduction

The RER recognised it faced particular challenges of balancing intensity with its ambition for scope and coverage. P&As starting point was to develop, and agree, a structured and reductive RER approach and which was considered to be best-fitted to the particular challenges of:

- The intensity of the study – with the review needing to be concluded within 13 weeks of commencement
- The very wide potential evidence base expected – needing an approach combining broad identification of potential in-scope sources and a reduction strategy to provide a subsequent focus on those sources most relevant to the study objectives
- An applied emphasis looking to identify evidence-based lessons and implications specifically for a possible GMCA initiative and more generally for other future place-based interventions.

The approach developed was aided by close collaboration with Ageing Better, and its principal partners, and has been regarded as successful within the constraints of time and available evidence. Reflections on effectiveness of the methodology are set out in Chapter 5 of the final report and not repeated here.

## Scope of the RER

The scope of the study focussed on existing evidence syntheses (outlined below) supplemented by a review of further appropriate sources from searching agreed bibliographic and on-line databases to scope appropriate literature. This was expected to cover evidence-based academic studies, official and non-official (i.e. grey) reports and documentation such as programme evaluations and post-implementation reviews (PIRs), professional literature and other published studies and relevant sources of data. Past

evidence syntheses on which the RER was able to draw included reviews by DWP from 2003 and 2010<sup>2</sup>.

As a result, the study was able to focus its search on evidence emerging since 2010 with its effort divided into two parts as summarised in Figure 2.1.

## Figure 2.1: RER Approach

### Phase 1: Evidence search & review

- Academic sources
- Governmental sources
- Professional and institutional sources
- International sources



### Phase 2.1: 'Extended' Matrices of key evidence and practice examples

Source	Location	Target(s)	Policy/ practice and context	Evidence context	Transferability
Publication, agency, etc.	Country, region, area	jobseekers, older workers, segmented older workers, etc.	Brief description of action; labour market, institutions, economic contexts, etc.	Policy, or menu with relevant parts highlighted; scope/quality of evidence available on effectiveness	Key considerations applying the policy and evidence to place-based/ GM context



### Phase 2.2: 11 Good Practice Fiches

- More expansive description and themed review of:
- The more promising actions/examples (or parts of them) with operational viability
  - Those with better prospects for transferability to place-based actions



## DRAFT & FINAL RER REPORT

The search and reduction processes involved across these phases are summarised in 2.3 and 2.4 below. Both have involved working closely with the RER partners to ensure that the

<sup>2</sup> Moss N and Arrowsmith J (2003) A review of 'what works' for clients aged over 50 (DWP, unpublished in-house research and DWP (2010) 50+ back-to-work evidence review and indicators guide for secondary analysis (DWP Research Report 615).

search approach and reduction focus was well-gearred to the overall goal and objectives of the study.

## Phase 1 approach – evidence identification and search strategy

To guide the overall search strategy a primary review ‘question’ was agreed with the partners<sup>3</sup>:

**What is the evidence on what works (and what does not) for employment and skills support activities, interventions and pathways back to work for the economically inactive or unemployed over 50s population?**

Subsidiary questions were also agreed to further refine the search strategy and looked at:

- i. What are the interventions that have been undertaken, what is their focus and constituent activities and in what contexts have they been undertaken?
- ii. How effective have past support activities and interventions been, and is there evidence of effective segmentation of support for different (sub) groups of older jobseekers, and how this is delivered?
- iii. What are the influences on (and barriers to) effective delivery and outcomes of interventions and their constituent parts?
- iv. How robust is the methodological basis of the various sources for this evidence?
- v. What is the likely transferability of the evidence of effective support measures to new employment support interventions aimed at jobseekers aged 50+ to place-based actions?

Evidence was expected to be drawn from several key sources – academic, professional and governmental, and crossing several conventional disciplinary boundaries<sup>4</sup>, and included:

- Published research and summative evaluation studies of employment and/or skills support interventions and related health and welfare initiatives for over 50s. This included both targeted interventions for 50+ and also generic policies/ interventions which were able to provide well-evidenced outcomes by age.
- Targeted interventions from public or other agencies in the UK, Europe or other appropriate international experience and which were aimed at people who were economically inactive and/or unemployed over 50+
- Contextual (baseline) data which helped define the nature of demand, needs and/or pathways into (re) employment (Phase 1 only).

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<sup>3</sup> This was developed with partners and took account of preliminary work by Ageing Better which set out a number of defined Areas of Investigation for the study.

<sup>4</sup> In particular: gerontology, labour market, psychology and other applied areas of social science, human resources and employee relations, and occupational health.

Across this, the RER focussed on evidence-based studies (quantitative and/or qualitative) and specifically those published in and after 2010 (although these were often drawing on pre-2010 evidence). In Phase 1, the study was particularly keen to identify sources with at least some evidence of influences or success factors in supporting re-entry to work of the 50+ unemployed or those seeking work.

## Phase 2 approach - evidence reduction

Phase 2 built on the evidence scoping and preliminary review and provided for an evidence reduction process and comparative review. This was itself divided into two stages with the results of evidence sources reviewed and harnessed summarised in Figure A1.

**Phase 2.1:** Selection and production of 'extended matrices' for all four source areas (academic, governmental, professional and institutional and international). A total of 45 individual sources were selected for more detailed review to include the policy or practice context, targeting relating to 50+, evidence of effective delivery and transferability to place-based contexts. This concluded with reporting to Ageing Better and proposals for Phase 2.2.

**Figure A1 Evidence reduction in Phase 2**

Evidence source area	In-scope sources from Phase 1	Not included in Phase 2	Included as extended matrices)	Agreed evidence fiches
Academic and other research sources	46	26	20	4
Governmental (DWP, DFE, BEIS, WHU and others)	23	15	8	3
Professional and institutional sources	19	8	11	1
International sources	12	6	6	3
<b>Totals</b>	<b>100</b>	<b>55</b>	<b>45</b>	<b>11</b>

Phase 2.2: This produced synthesised evidence fiches (see below) of 11 of the individual sources of most significance to place-based actions with a particular focus on delivery, what works lessons, moderators – including success factors and barriers to effectiveness and implications for transferability to place-based contexts for 50+ employment support actions.

Section C of this Technical Report sets out the completed extended matrices for each of academic, governmental, professional and institutional, and for international sources. These are notional divisions since many of the researchers or evaluators contributing to both government and professional sources were individuals whose research was also included in academic publications. Section D also sets out the completed evidence fiches.



## Evidence coverage

The coverage of the RER in Phase 1 was validated first through partner feedback on the Phase 1 report and afterwards through liaison with selected key academics. This led to a small number of additional sources being added; one contributing a further extended matrix. As expected, most of the initially identified sources from Phase 1 were not included in the extended matrices. This reduction process was informed by a much sharper focus on the relevance of the previously identified 2010+ sources, focussing<sup>5</sup> on sources which:

- Were well-aligned with the evidence needs of the RER on return to work pathways back to employment for older people seeking work
- Had better potential transferability to the place-based context for any GMCA or similar focus for a 50+ active support intervention aimed at 50+ economically inactive or unemployed
- Had sufficient evidence strength to provide for robust issues identification and/or credible 'what's works' lessons on which to draw for a place-based 50+ employment support innovation.

The sources not covered in the extended matrixes were most likely to fall into one or more of the following:

- Conceptually orientated (mainly academic) sources often with limited, small-scale or wholly qualitative evidence
- Research or evaluation which was centred on in-work older people and/or associated workplace management issues looking at the retention or more productive use of older workers<sup>6</sup>
- Studies focussing on employer management practices for existing older workers, their retention or support of extended working lives for those already in employment
- Research on older workers close to (or post) retirement and associated exit planning for individuals and organisations employing them.

This predominantly included national or home country studies in the UK. An exploratory review was undertaken of international sources and where phase 1 had identified these as of particular significance or potential transferability. However, these sources were very extensive, as noted in the final report, and the RER recommends further and more comprehensive review as likely to be beneficial to policy and programme formation in the UK.

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5 This reduction focus was based on the specific RER sourcing statement agreed at inception.

6 In-work orientated studies were an important focus for both the academic and professional literature and were covered in the extended matrices only where there was a significant focus on recruitment or selection strategies for 50+ which could be informative to engaging employers in place-based actions to support employment and re-entry of those out of work.

# Section B: Consulted sources (2010>) – Phase 1 review of content and relevance to RER

**Preface:** This section sets out all sources identified and consulted in Phase 1 to review relevance to the specific focus of the RER. It does not consider sources published prior to 2010 or otherwise out of scope of the search criteria. Four summary matrices are presented for:

- Academic and related sources (B.1)
- Governmental sources (B.2)
- Professional and institutional sources (B.3)
- International sources (B.4).

## B.1: Academic and related literature and sources

	Source Details of Journal; Research Report; Working Paper (web link?). etc.	Date of publication	Relevance to RER	Notes
<b>A1.</b> (Included). McNair, S. (2010) <i>A sense of a future: A study of training and work in later life.</i>	A Report for the Nuffield Foundation. National Institute of Adult Continuing Education. Leicester.	2010	A watershed and broadly based review focussed on over 50s of skills, skills needs, and employer practices.	The research uses multiple sources including datasets, attitude surveys, and interviews with older people and employers.

<p><b>A2.</b> (Not included). Gayen K, McQuaid R, and Raeside R (2010), <i>Social networks, age cohorts and employment</i>.</p> <p>Not considered for extended matrices because of largely conceptual focus, Scottish (small) sample and marginal relevance for other place-based contexts aimed at return to work or re-engagement of 50+.</p>	<p>International Journal of Sociology and Social Policy <b>30</b>:219–38.</p>	<p>2010</p>	<p>The work has limited relevance to this RER but provides (to 2010) a wide review of literature and conceptualisation of age-employment effects. However, it is largely conceptual and uses some dated cohort data (2003-4).</p>	<p>An investigation of the association of social networks with being in work, contrasting those under age 50 with those over 50 years. Using a case study of the City of Edinburgh using Scottish Household survey data and supplementary evidence collected by interview using a semi-structured questionnaire from 194 people divided into four groups.</p>
<p><b>A3.</b> (Included). McNair, S. (2011) Older people and skills in a changing economy.</p>	<p>McNair, S. (2011) Older people and skills in a changing economy. Briefing Paper Series, UK Commission for Employment and Skills.</p>	<p>2011</p>	<p>A little dated now but this provides for a broadly based, multi-source meta-analysis for UKCES, which includes a review of active measures and also implicit and explicit barriers to change.</p>	<p>Draws on a wider range of past research and data to review the trends and challenges of the 50+ labour force and wider policy implications.</p>
<p><b>A4.</b> (Not included). Boumans N, de Jong A and Janssen S (2011), 'Age-differences in work motivation and job satisfaction: The influence of age on the relationships between work characteristics and workers' outcomes'</p> <p>Not considered for extended matrices because of all age focus and largely internal labour market emphasis of marginal relevance for place-based return to work contexts for 50+.</p>	<p>The International Journal of Aging and Human Development, 73(4), pp. 331-350</p>	<p>2011</p>	<p>All age review but drawing older worker implications.</p>	<p>-</p>

<b>A5.</b> (Included). CLES (2011), <i>Barriers to Employment in Blackburn with Darwen for People aged 50+</i>	Blackburn with Darwen Strategic Partnership & Blackburn 50+ Partnership; CLES Consulting	2011	Early CLES contribution of 50+ barriers – specific to this local labour market in NW	Qualitative review with quantification from limited programme Mi
<b>A6.</b> (Included). Devins, D. Bickerstaffe, T. Nunn, A. and Mitchell, B. with McQuaid, R. and Egdell, V. (2011), <i>The role of skills from worklessness to sustainable employment with progression.</i>	UK Commission for Employment and Skills (UKCES), London	2011	Influential UKCES all age review of the skills contribution to employment transitions - not older worker specific	Meta-analysis with supplementary survey and case study evidence
<b>A7.</b> (Not included). Timmons J, Hall A, Fesko S and Migliore A (2011), <i>'Retaining the Older Workforce: Social Policy Considerations for the Universally Designed Workplace'</i>  Not considered for extended matrices because of limited relevance.	Journal of Ageing and Social Policy, 23(2), pp. 119-140	2011	A largely qualitative and conceptual review of organisational policy implications for underpinning workforce retention practices for older workers.	In-depth organisational case study work but limited to 18 organisations – mainly in the US.
<b>A8.</b> (Included). Geuskens G, Oude Hengel K M, Koppes L and Ybema J F (2012), <i>'Predictors of the willingness and the ability to continue working until the age of 65 years.'</i>	Journal of Occupational Environmental Medicine, 54(5), pp. 572-8	2012	Assessment of behavioural and psychological characteristics of older age working intentions.	Widely cited indicator based assessment.
<b>A9.</b> (Included). TAEN (2012), <i>ESF Projects Successfully Engaging with the Over 50s</i>	Third Age Employment Network (TAEN)	2012	Meta-analysis of ESF funded projects in UK with some	-
<b>A10.</b> (Not included). Carr D and Kail B (2012), <i>'The Influence of Unpaid Work on the Transition Out of Full-Time Paid Work'</i>	The Gerontologist, 53(1), pp. 92-101	2012	Research based review of evidence of the role of non-paid work on pre-retirement transitions.	-

<p><b>A11.</b> (Not included). Lain D (2012), <i>Working Past 65 in the UK and the USA: Segregation into 'LOPAQ' Occupations?</i></p> <p>Not considered for extended matrices because of focus on pre-retirement 'exit' preparation.</p>	<p>Work Employment and Society</p>	<p>2012</p>	<p>US-UK contrasts of post SPA/retirement age working</p>	<p>Not considered for extended matrices because of focus on post SPA actions.</p>
<p><b>A12.</b> (Not included). Leppel K, Brucker E and Cochran J (2012), <i>'The importance of job training to job satisfaction of older workers.'</i></p> <p>Not considered for extended matrices because of largely conceptual orientation and focus on training-job satisfaction relationships of those in work.</p>	<p>Journal of Ageing and Social Policy, 24(1), pp. 62-76</p>	<p>2012</p>	<p>Evidence of the positive association of in-work training and career development to job satisfaction.</p>	<p>Empirical work with a conceptual focus in organisational development theory.</p>
<p><b>A13.</b> (Included). Ng, T. &amp; Feldman, D. (2012) <i>'Evaluating Six Common Stereotypes about Older Workers with Meta-Analytical Data.'</i></p>	<p><i>Personnel Psychology</i>, 65(4): 821-858.</p>	<p>2012</p>	<p>Relevant in robustly de-bunking conventional stereotypes about 50+ in or seeking work. The only stereotype consistent with empirical evidence was that older workers are less willing to participate in training and career development activities with some conclusions for management practice.</p>	<p>A meta-analysis (418 empirical studies) on 6 common age-related work stereotypes (less motivated, etc.). The meta analysis covered over 200,000 (individual) data records of older people internationally.</p>
<p><b>A14.</b> (Included). Pagán R (2012), <i>'Transitions to part-time work at older ages: the case of people with disabilities in Europe.'</i> Disability and Society, 27(1), pp. 95-115</p>	<p>Disability and Society, 27(1), pp. 95-115</p>	<p>2012</p>	<p>One of the few published analyses of the relationship between reductions in working time in later life and physical and mental disability.</p>	<p>A meta-analysis of European evidence. Contrasting maturity in disability support systems may mean this has limited application to UK contexts</p>

<p><b>A15.</b> (Included). Canduela J, Dutton M, and Johnson S, et al (2012), <i>Ageing, skills and participation in work-related training in Britain: assessing the position of older workers</i>.</p>	<p>Work Employment and Society; <b>26</b>:42-60. Sage, London.</p>	<p>2012</p>	<p>The paper follows up the Taylor and Urwin 2001 review of LFS data from 1997 on older workers and training propensity. The evidence that older workers are more likely to have never been offered training by employers is relevant to any challenge to negative employer attitudes and/or support redress inequalities in access to skills upgrading and reskilling.</p>	<p>This article models LFS data from 2007 to extend that analysis and finds significant inequalities in participation, especially for men, and suggests a polarization in access to jobs that offer opportunities for training and progression.</p>
<p><b>A16.</b> (Not included). Cory, G. (2013) <i>Getting On: Universal Credit and older workers</i>.</p> <p>Not reviewed as an extended fiche because of more up to date evidence from DWP being covered in the Phase 2 review.</p>	<p>Report published by the Resolution Foundation, London.</p>	<p>2013</p>	<p>Relevant in setting the passive labour market policy context for older workers on benefits and subject to the UC reforms.</p>	<p>A review of passive labour market effects for older workers of welfare changes and specifically UC. It assesses a polarising effects of UC for encouraging more older people into work because the government's new flagship welfare reform delivers only mixed benefits for the age group – with some better off and some worse leading to (for some) financial incentives to work reduced by up to 18%.</p>
<p><b>A17.</b> (Not included). TAEN, <i>Survey of Jobseekers Aged 50+</i></p> <p>This is not included as an extended matrix because there is more up to date and robust survey data available from more recent sources.</p>	<p>Third Age Employment Network and the University of Edinburgh Business School, <a href="http://taen.org.uk/uploads/resources/">http://taen.org.uk/uploads/resources/</a></p>	<p>2013</p>	<p>Survey mapping characteristics and aspirations.</p>	<p>-</p>

<p><b>A18.</b> (Not included). Parry S and Mallett O (2014) <i>Motivation for later-life entrepreneurship</i>.</p> <p>Not considered for an extended matrix because the empirical base is (very) small and has limited relevance for ALMP contexts unless centred on promoting self-employment pathways.</p>	<p>Newcastle University Business School: Discussion Paper.</p>	<p>2014</p>	<p>Centred on older age self-employment and entrepreneurship; its main focus is on what they refer 'privileged' entrepreneurs. The paper offers useful additional insights into s/e as a later life option but with limited relevance to GM or wider policy interests (beyond support for higher opportunity over 50s).</p>	<p>An examination of motivations for later-life entrepreneurship from past empirical evidence and a small number of case studies to explain why entrepreneurship and s/e increases with age up to 35 to 45 years, falling after.</p>
<p><b>A19.</b> (Not included). Resolution Foundation (2014), <i>Just the job – or a working compromise? The changing nature of self-employment in the UK</i></p> <p>Not included because of limited relevance for ALMP contexts from its focus on promoting self-employment pathways.</p>	<p>Resolution Foundation, London</p>	<p>2014</p>	<p>Meta-analysis of self-employment – all age but with some age-related evidence.</p>	<p>Stronger empirical base than Parry and Mallett (2014) but with limited relevance for ALMP contexts unless centred on promoting self-employment pathways. Not considered for an extended matrix.</p>
<p><b>A20.</b> (Not included) Van Stolk c, Hofman J, Hafner M and Barbara J (2014), <i>Psychological Wellbeing and Work: Improving Service Provision and Outcomes</i>.</p>	<p>Department for Work and Pensions and Department for Health, London</p> <p><a href="https://www.gov.uk/government/publications/psychological-wellbeing-and-work-improving-service-provision-and-outcomes">https://www.gov.uk/government/publications/psychological-wellbeing-and-work-improving-service-provision-and-outcomes</a></p>	<p>2014</p>	<p>Meta-analysis conducted by RAND Europe for DWP and DoH from Cabinet Office Contestable Policy Fund – not age specific but with age related outcomes.</p>	<p>All age review providing evidence to guide policy on how to improve employment and health outcomes for people with common mental health problems.</p>



<p><b>A21.</b> (Not included). Fuertes V, and McQuaid R (2015). <i>'Personalized activation policies for the long-term unemployed: the role of local governance in the UK'</i>.</p> <p>EU focus and all-age emphasis means not selected as an extended matrix. There are better evidence reviews in 'international' sources.</p>	<p>Chp 2 in Heidenreich M and Rice D (Eds), <i>Integrating Social and Employment Policies in Europe: Active Inclusion and Challenges for Local Welfare Governance</i>, Elgar Publishing, Cheltenham.</p> <p><a href="http://www.eelgar.com/shop/integrating-social-and-employment-policies-in-europe">http://www.eelgar.com/shop/integrating-social-and-employment-policies-in-europe</a></p>	<p>2015</p>	<p>A broadly based review since the 1990s of activation policies for the wider LTU – not specific to 50+ - within the UK.</p>	<p>The 'all-age' review also looks at the increase of active labour market policies and analyses a focus on (mostly) characterized by supply-side measures, disconnected from demand-side labour market policies.</p>
<p><b>A22.</b> (Included). Hyde M and Philipson C (2015), <i>How can lifelong learning, including continuous training within the labour market, be enabled and who will pay for this?</i></p>	<p>Government Office for Science. London.</p>	<p>2015</p>	<p>Relevant to any activation measures which include a stimulus to formal learning. Also indicates empirical evidence of the benefits of lifelong learning to individual health and the health of wider society (although not specifically to over 50s).</p>	<p>A forward looking (to 2025 and 2040) assessment of lifelong learning options and strategies. This identified a sharp decline (2005-10) in all age group participation, intensified for over 50s who appear less likely to request work-related learning, set against other evidence which highlights the benefits of lifelong learning to individual health.</p>



<p><b>A23.</b> (Included). Watts J and McNair S, et al ((2015), <i>Mid-life career review: Pilot project outcomes</i>).</p>	<p>Evaluation study published by National Institute of Adult Continuing Education (NIACE) Leicester</p>	<p>2015</p>	<p>One of the few recent UK studies focussed on older age active measures centred on IAG (career) interventions. Provides an evidence-based review of the BIS funded programme of 'mid-life' career reviews (the Mid Life Career Review (MLCR) Project).</p>	<p>The MLCR pilots were extensive – and multi-faceted. They covered delivery to 3,000 people variously through face-to-face (individually and in groups), over the phone, and online, and by National Careers Service Contractors, Unionlearn and VCS partners. Research evidence included broadly based survey and interview evidence.</p>
<p><b>A24a</b> (Not included). Cox A et al (2015), <i>The effectiveness and cost effectiveness of methods of protecting and promoting the health of older workers</i>.</p> <p><b>A24b</b> (Not included) Cox A et al (2015), <i>Effectiveness and cost effectiveness of ways to help older workers plan and prepare for retirement</i>.</p> <p>Not considered for an extended matrix because of focus on workplace health of older workers. This may need revisiting if in-work support is a focus for any GMCA initiative.</p>	<p>IES Research Report for NICE</p>	<p>2015</p>	<p>Two inter-linked review for NICE. The first (A24a) provides a cost-effectiveness review for NICE of workplace policies and practices to protect and promote the health and wellbeing of older workers. The second (A24b) a largely qualitative review looking at costs and effectiveness of workplace policies and practices to support pre-retirement planning. Relevant for any health geared focus for 50+ activation, and support strategies for those wishing to continue in employment up to and beyond state pensionable age.</p>	<p>NB. Subsequent reviews covered workplace policies and practices on pre-retirement planning and examined the factors affecting the health and wellbeing of older workers, both in work and in subsequent retirement.</p>

<p><b>A25.</b> (Not included). Loretto W, Vickerstaff S. <i>'Gender, age and flexible working later in life'</i>.</p> <p>Not included as source data draws on a pre-existing study (200* and is small-scale and qualitative in focus with relatively few of interviewed 50+ working flexibly.</p>	<p>Work, employment and society. 29(2): pp.233-49.</p>	<p>2015</p>	<p>A review combining a well-rehearsed review of past literature on flexible working and age with UK-based qualitative evidence from a 2008 DWP funded study of (N=96) 60+ in work and attitudes to flexible working.</p>	<p>Limited relevance to this RER as focuses on 60+ experiences and with a limited data set of those working flexibly. Main motivations were 'freedom', time and balance (time sovereignty) and choice and control over working hours.</p>
<p><b>A26.</b> (Not included). Cox A et al (2015), <i>Factors facilitating or constraining interventions to protect and promote health of older workers and to help plan and prepare for retirement.</i></p> <p>Limited empirical basis and with no locality dimension. Focus is also on pre-retirement planning and workplace-based preparation – so not considered for an extended matrix – see A24 and A25.</p>	<p>IES Research Report for NICE</p>	<p>2015</p>	<p>Predominantly focussing on in-employment over 50s and factors which enable constrain employers in implementing positive wellbeing workplace policies and practices. Relevant also for support to workers who wish to continue in employment up to and beyond state pensionable age.</p>	<p>The third of the three reviews based on qualitative, non-intervention studies – see A24.</p>
<p><b>A27.</b> (Not included). Buckle P (2015), <i>Workplace infrastructure, future of ageing.</i></p> <p>Not considered for an extended matrix because of focus on workplace infrastructure, environment and technology for extending working lives of existing in-work older workers – an unlikely priority for a GMCA initiative.</p>	<p>Report for the Government Office for Science, London</p>	<p>2015</p>	<p>Focuses largely on workplace infrastructure, environment and technology infrastructure factors that play a part in enabling extended working lives.</p>	<p>Evidence review, Report commissioned as part of the UK government's Foresight Future of Ageing project.</p>

<p><b>A28.</b> (Not included). Kim N and Kang S-W (2016), '<i>Older and more engaged: The mediating role of age-linked resources on work engagement</i>'.  Not selected as an extended matrix because empirical focus is wholly in US where labour market and cultural factors make comparability doubtful.</p>	<p>Human Resource Management, Vol 6; pp. 1-16</p>	<p>2016</p>	<p>A review of contrasting work engagement features (and motivations) among older and younger employees on a range of job quality measures, but with some consideration of practical implications in work settings.</p>	<p>Findings reveal the importance of recognising age diversity among both young and old employees.</p>
<p><b>A29.</b> (Included). Marvell R and Cox A (2016), '<i>Fulfilling work: what do older workers value about work and why?</i>'.</p>	<p>IES Research Report for Centre for Ageing Better</p>	<p>2016</p>	<p>A useful cross-disciplinary synthesis of a range of research relevant to motivational aspects of 50+ activation.</p>	<p>RER that identifies the characteristics of work that are important to people aged 50 and over, and explores actions employers can take to attract and retain them.</p>
<p><b>A30.</b> (Not included). Guglielmi D, Avanzi L, Chiesa R, Mariani M, Bruni I, Depolo M (2016), '<i>Positive aging in demanding workplaces: The gain cycle between job satisfaction and work engagement</i>'.  Not chosen for an extended matrix because data mainly drawn from Italy and the public sector employees - limited application to UK contexts.</p>	<p>Frontiers in Psychology, 15(7), pp. 1224  <a href="https://www.researchgate.net/publication/306104560_Positive_Aging_in_Demanding_Workplaces_The_Gain_Cycle_between_Job_Satisfaction_and_Work_Engagement">https://www.researchgate.net/publication/306104560_Positive_Aging_in_Demanding_Workplaces_The_Gain_Cycle_between_Job_Satisfaction_and_Work_Engagement</a></p>	<p>2016</p>	<p>One of the more current empirical assessments of contrasting motivational process and work engagement (gain cycle) reviewing how these work in different age cohorts.</p>	<p>Data drawn from employees in public administrations in Italy (556 workers aged between 50 and 64).</p>

<p><b>A31.</b> (Not included). Boot C, de Kruif A, Shaw W, va der Beek A, Deeg D and Abma T (2016), 'Factors important for work participation among older workers with depression, cardiovascular disease, and osteoarthritis'.</p> <p>A very specific work participation focus set within an OH operating context. Although focussing on common 'ageing' clinical conditions it is too specialised to be selected for an extended matrix.</p>	<p>Journal of Occupational Rehabilitation, 26, pp. 160–172</p>	<p>2016</p>	<p>A socio-clinical meta-analysis with a quantitative focus.</p>	<p>A mixed-method study', Journal of Occupational Rehabilitation, 26, pp. 160–172.</p>
<p><b>A32.</b> (Not included). Brown J et al (2017), <i>Protocol for a mixed-methods longitudinal study to identify factors influencing return to work in the over 50s participating in the UK Work Programme: Supporting Older People into Employment (SOPIE)</i>.</p> <p>A methodologically centred paper so not selected for an extended matrix.</p>	<p>e-publication in: BMJ Open. Vol 5, 12.</p>	<p>2017</p>	<p>An essentially scoping exercise and rationale for a protocol for the mixed methods longitudinal study – methodological paper reviewing the scope and positioning necessary for the SOPIE study, and profiling past empirical approaches to understanding employment and worklessness among over 50s.</p>	<p>The paper is widely cited in recent academic sources and provides a robust critical assessment of research and evaluation methods within this age and needs group.</p> <p>Findings from SOPIE are currently being disseminated – see A33 and A44.</p>

<p><b>A33.</b> (Not included). Brown, J. , McQuaid, R., Katikireddi, S. V., Leyland, A., Frank, J., Molaodi, O. R. and Macdonald, E. B. <i>'Visualising the Unemployment-to-employment Transitions to Explore Factors Influencing Return to Work in the Work Programme: Results from the SOPIE Cohort.</i></p> <p>Not selected for extended matrix as the subsequent publication extends this preliminary analysis.</p>	<p>Eliminating Occupational Disease: Translating Research into Action: EPICOH Symposium, Edinburgh, UK, 28-31 Aug</p>	<p>2017</p>	<p>An early presentation of preliminary findings from the SOPIE cohort study of Work programme administrative data on age-related return to work propensities.</p>	<p>Data subsequently extended in first SOPIE publication – see A44 below. See A44 for more recent findings.</p>
<p><b>A34.</b> (Not included). CLES, Addressing worklessness and job insecurity amongst people aged 50 and over in Greater Manchester.</p> <p>This work is well known to GMCA etc. Qualitative study of limited scale and not set against provider/ practice context so not selected for extended matrix.</p>	<p>Research Report by the Centre for Local Economic Strategies (CLES) and Learning and Work Institute.</p>	<p>2017</p>	<p>GM focussed; resident's insights and experiences of LM barriers and constraints.</p>	<p>Limited to small-scale quali work – five localities in GM via workshops and limited to non-validated experiences of 60 individuals.</p>
<p><b>A35.</b> (Included). Vickerstaff S et al (2017), <i>Exploring Retirement Transitions.</i></p>	<p>Research report from the ILC-UK and the Uncertain Futures research consortium.</p>	<p>2017</p>	<p>A research report looking at the nature of changing expectations and practices around retirement transitions with implications for personal support, employment practices and a range of public policy issues.</p>	<p>The evidence is drawn from multiple primary and secondary sources from the "Uncertain Futures" consortium, and includes policy and practice implications.</p>

<p><b>A36.</b> (Included).          WHERL (2017), <i>The Wellbeing, Health, Retirement and Lifecourse Project</i>.</p>	<p>Final report of the research programme.          Kings College London.</p>		<p>Broad older age focus but with particular emphasis on people working up to and beyond State Pension Age (SPA). The report draws out the implications for policy and cross-lifecourse inequalities.</p>	<p>Report for the three year, interdisciplinary, WHERL project investigating how inequalities across the lifecourse are related to paid work in later life in the UK. The report brings together a number of inter-related studies of cross-cutting factors that can affect the likelihood that individuals will work up to and beyond State Pension Age, as well as the impact this can have on their health, wellbeing and financial circumstances.</p>
<p><b>A37.</b> (Not included).          Di Gesa G et al (2017), <i>Is being in paid work beyond state pension age beneficial for health? Evidence from England using a life-course approach</i>.</p> <p>The study findings were also profiled in the WHERL final report. Not included as extended matrix – see A36.</p>	<p>Research Report.          Kings College London.</p>	<p>2017</p>	<p>Data-based review looking at health consequences for extending working lives – with a focus those beyond state pension age.</p>	<p>WHERL related study extending other evidence which has commonly looked at the health of those who exit the labour force early. Data was drawn from the English Longitudinal Study of Ageing, with regression analysis of longitudinal associations between work, depression, somatic health and sleep disturbance.</p>

<p><b>A38.</b> (Included) Murray M, <i>Spotlight on Lifelong Learning for an Ageing Workforce</i>.</p>	<p>2nd Spotlights Project Report from Skills Commission, March 2017</p> <p><a href="https://www.policyconnect.org.uk/research/spotlight-onlifelong-learning-ageing-workforce">https://www.policyconnect.org.uk/research/spotlight-onlifelong-learning-ageing-workforce</a></p>	<p>2017</p>	<p>A review report largely harnessing evidence from other sources but drawing together a focus on learning and training of older workers and those seeking work.</p>	<p>One of few sources with a specific focus on wider LM context of skills and training for older workers – adopts a consistent 50+ focus.</p>
<p><b>A39.</b> (Not included). Wainwright D, Crawford J, Loretto W and Phillipson C (2018), <i>Extending working life and the management of change. Is the workplace ready for the ageing worker?</i></p> <p>Not an extended matrix; the empirical focus is small-scale and qualitative. It is also centred mainly on management issues for internal LMs.</p>	<p><i>Age and Society</i>. Online publication at: <a href="http://www.cambridge.org/core/journals/ageing-and-society/article/extending-working-life-and-the-management-of-change-is-the-workplace-ready-for-the-ageing-worker/FFB91DDFBEC29AA2684E61AAC2DFE35A">www.cambridge.org/core/journals/ageing-and-society/article/extending-working-life-and-the-management-of-change-is-the-workplace-ready-for-the-ageing-worker/FFB91DDFBEC29AA2684E61AAC2DFE35A</a></p>	<p>2018</p>	<p>Limited scale research on workplace readiness for extended working lives. Qualitative analysis of the state of play in age-sensitive workplace practices responding to labour force demographics through small-scale organisation-level case studies.</p>	<p>Analysis from the Uncertain Futures programme (Kent) It is limited to five large organisations located in the United Kingdom drawing on a mixture of interviews and focus groups with employees, line managers, occupational health staff and human resources managers. It concludes with observations about the challenges facing employers and policy makers in making the modern workplace fit for the ageing worker.</p>
<p><b>A40.</b> (Included). Wilkinson L and Pike T (2018), <i>The Evolving Retirement Landscape</i>.</p>	<p>Report published by the Pension Policy Institute, London</p>	<p>2018</p>	<p>A retirement+ analysis but with a focus on financial pathways and impacts of flexible choice with implications for working practice and future retirees.</p>	<p>This first or two planned reports looking at the ways in which the UK retirement landscape has changed since the pensions freedoms were introduced.</p>



<p><b>A41.</b> (Not included). Phillipson C, Shepherd S, Robinson M and Vickerstaff S (2018), <i>'Uncertain futures: Organisational Influences on the Transition from Work to Retirement'</i>.</p> <p>Not an extended matrix; the focus is mainly on end of working life transitions and its relevance is greater for internal LMs than place-based 'return to work' transitions for 50+.</p>	<p>Online publication in: <i>Social Policy in Society</i> at: <a href="https://www.cambridge.org/core/journals/social-policy-and-society/article/uncertain-futures-organisational-influences-on-the-transition-from-work-to-retirement/9B73C43EE68C0B71F2242797806A5C48">https://www.cambridge.org/core/journals/social-policy-and-society/article/uncertain-futures-organisational-influences-on-the-transition-from-work-to-retirement/9B73C43EE68C0B71F2242797806A5C48</a></p>	<p>2018</p>	<p>Wider assessment of work-exits transitions which is not limited to a focus on older age phased and planned retirement; includes evidence-based insights on the limits to individual choice and control over pathways through middle and late working careers.</p>	<p>A research paper from the Kent 'Uncertain Futures' team looking at the nature and characteristics of work-retirement transitions, personal constructs around 'work-ending', the construction of age within organisations, and the influences on provision of support in late working life.</p>
<p><b>A42.</b> (Not included). Gloster R, Edwards M, Spiegelhalter K, Newton B and Hirsch W (2018), <i>Thinking Ahead</i>.</p> <p>Not an extended matrix – focus is qualitative and mainly on internal LMs.</p>	<p>Report published by Centre for Ageing Better, London</p>		<p>IES report for Centre for Ageing Better, London and Calouste Gulbenkian Foundation reviewing workplace support strategies and practice at and after mid-career.</p>	<p>Qualitative research limited to larger employers and based mainly on 25 organisational case studies, and small number of stakeholders and training providers.</p>



<p><b>A43.</b> (Included). Di Gesa G, Corna L M, Price D and Glaser G (2018), 'The decision to work after state pension age and how it affects quality of life: evidence from a 6-year English panel study'.</p>	<p>Age and Ageing 47. 3, 1 450-457</p>	<p>2018</p>	<p>The study may have some relevance to the RER because of empirical evidence associating financial pressures driving work post SPA leading to significantly lower QoL and the converse for those continuing because of affinity with the work.</p>	<p>A WHERL study based on panel survey evidence from the English Longitudinal Study on Ageing. Data was based on a large sample of those over SPA (N=+2,000) and regression analysis of QoL measured (CASP-19 scale) for those beyond state pension age and in paid work. There is some counterfactual evidence to support this association and the importance older people maintaining control over their decision to work in later life. Not an extended matrix – see WHERL final report in A36.</p>
<p><b>A44.</b> (Included). Brown J, Katikireddi S V, Leyland A H, McQuaid R W, Frank J, Macdonald E B, 'Age, health and other factors associated with return to work for those engaging with a welfare-to-work initiative: a cohort study of administrative data from the UK's Work Programme'.</p>	<p>BMJ Open, 8(10), e024938</p>	<p>2018</p>	<p>The cohort study centres on Scotland and contrasting outcomes for JSA and ESA clients in the Work Programme to assess age effects within different activity regimes, and effects of multiple morbidities.</p>	<p>This is the first publication from the SOPIE study financed by MRC and others.</p>
<p><b>A45.</b> (Not included). Felstead A, Gallie D, Green F and Henseke G, <i>Skills and Employment Survey, 2017</i>.</p> <p>Not an extended matrix – no breakdowns by age.</p>	<p>University of Cardiff. Cardiff <a href="https://www.cardiff.ac.uk/research/explore/find-a-project/view/626669-skills-and-employment-survey-2017">https://www.cardiff.ac.uk/research/explore/find-a-project/view/626669-skills-and-employment-survey-2017</a></p>	<p>2018</p>	<p>The 7th SES survey (N=3,306) looking at what people do at work, what skills they use and how they work. No relevance beyond benchmarking as no breakdowns by age.</p>	<p>Funded by the Economic and Social Research Council (ESRC), Cardiff University and the Department for Education (DfE) with the Welsh Government providing additional funding for a Welsh boost.</p>

<p><b>A46</b> (Included) Wilson S, Marvell R, Cox A and Teeman D (2018) Evaluation of the Carers in Employment (CiE) Project: Final report.</p>	<p>Social Care Institute for excellence and Institute of Employment Studies. London.  <a href="https://www.employment-studies.co.uk/resource/evaluation-carers-employment-cie-project-final-report">https://www.employment-studies.co.uk/resource/evaluation-carers-employment-cie-project-final-report</a></p>	<p>2018</p>	<p>One of the few evidence-based reports looking at adult caring challenges and responses at the workplace.</p>	
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## B.2: Governmental sources

Content Title/author	Source Details of Journal; Research Report; Working. Etc.	Date of publication	Relevance to RER Brief rationale for value/use	Notes
<b>Department of Work and Pensions</b>				
<p><b>G1.</b>(Included) DWP/ BIS (2010) <i>Second survey of employers' policies, practices and preferences relating to age, 2010</i></p>	<p>Employment Relations Research Series No 110 (Metcalf H and Meadows P)</p> <p>file:///C:/Users/kenwa/Documents/P&amp;A%20Consulting/GMCA%20Over%2050s%20Employability%20-%20Aug18/Reports%20-%20Various/DWP%202010%20Second%20survey%20of%20employers%20policies,%20practices%20and%20preferences%20relating%20to%20age%202010.pdf</p>	<p>Jul 2010</p>	<p>Findings based on survey of over 2,000 establishments, looking at attitudes to age in recruitment, etc.</p>	<p>While the focus of the study was on changes since the 2006 Equal Opportunity (Age) legislation, there are detailed finding on attitudes to age in recruitment and in progression which could be instructive for policy.</p>
<p><b>G2.</b> (Included) DWP (2010) <i>50+ back to work evidence review and indicators guide for secondary analysis</i></p> <p>POSSIBLE FICHE</p>	<p>DWP Research Report No 615 by Policy Studies Institute (PSI)</p> <p><a href="http://www.psi.org.uk/pdf/2010/dwp_rrep615.pdf">http://www.psi.org.uk/pdf/2010/dwp_rrep615.pdf</a></p>	<p>2010</p>	<p>The main aim was to provide greater insight into how the scope, nature and effectiveness of DWP back to work provision supports the over 50s' return to work through identifying the key factors associated with successful programme outcomes and to assess which strategies are most effective for older age groups.</p>	<p>A potentially useful overview of pre-2010 27 reports covering 10 programmes or pilot programmes including the various permutations of New Deal. Looks at the programme findings and also any limitations of the research leading to these conclusions.</p>

<p><b>G3.</b> (Not Included) DWP (2011) Evaluation of the 50+ face-to-face guidance pilot</p> <p><i>Focused on those 50+ in work only and considering work and retirement options.</i></p>	<p>DWP Research report No 720 Full and summary reports available</p> <p><a href="https://www.gov.uk/government/publications/evaluation-of-the-50-face-to-face-guidance-pilot-">https://www.gov.uk/government/publications/evaluation-of-the-50-face-to-face-guidance-pilot-</a></p>	<p>Jun 2011</p>	<p>Longitudinal evaluation of a pilot that ran between January 2008 and March 2009. Providers offered guidance to employees aged 50 and above on a range of work and retirement issues using diverse service delivery methods.</p>	<p>The pilot was focused on those in employment so may have limited useful info for jobseekers. However, it could be instructive in understanding employers' attitudes to their older workers and how this might impact on recruitment of older jobseekers.</p>
<p><b>G4.</b> (Not included) DWP (2011) <i>Flexible New Deal Evaluation</i></p> <p><i>No analysis of the 50+ group and very little on 25+ with some mention of 18-24 group.</i></p>	<p>DWP Research Report No 758 Full and summary reports available</p> <p><a href="https://www.gov.uk/government/publications/flexible-new-deal-evaluation-rr758">https://www.gov.uk/government/publications/flexible-new-deal-evaluation-rr758</a></p>	<p>Jun 2011</p>	<p>Flexible New Deal offered a customised approach to service delivery and this study looks at the staff and customer experience from 2-15-month engagements.</p>	<p>The FND was aimed at under and over 25s but this study may lack much focus on the older customers, though might shed some light on the different approaches (end-to-end and staged delivery models).</p>
<p><b>G5.</b> (Included) DWP (2011) <i>Jobseekers' Allowance provision for the 50+</i></p>	<p>DWP Research Report No 766 Full and summary reports available</p> <p><a href="https://www.gov.uk/government/publications/jobseekers-allowance-provision-for-the-50-rr766">https://www.gov.uk/government/publications/jobseekers-allowance-provision-for-the-50-rr766</a></p>	<p>Aug 2011</p>	<p>Qualitative research on the additional support from April 2010 for JSA customers over 50 years of age believed to face age-related issues. Consisted of three voluntary measures: access to work trials from day one; entitlement to an extra 30 minutes of adviser time; and eligibility to be fast tracked to Stage 3 of Jobseekers Regime and Flexible New Deal (JRFND).</p>	<p>Focus is on whether the measures helped older jobseekers return to work and from different perspectives (customers and advisers). But the number of interviews was limited although the conclusions appear to be highly relevant.</p>

<p><b>G6.</b> (Not included) DWP (2012) Review of 50 Plus Works good practice guide and toolkit</p> <p><i>There is no investigation into whether the initiative raised awareness among provider staff or whether it helped spread good practice and ultimately whether older jobseekers benefited from it. It is no longer operational, and this short shelf-life might be indicative of the inherent value of the idea.</i></p>	<p>DWP In-House Research No IHR No 8 Full and summary annex summarising website stats</p> <p><a href="https://www.gov.uk/government/publications/review-of-50-plus-works-good-practice-guide-and-toolkit-in-house-research-no-8">https://www.gov.uk/government/publications/review-of-50-plus-works-good-practice-guide-and-toolkit-in-house-research-no-8</a></p>	<p>Mar 2012</p>	<p>Qualitative review of the 50-Plus Works website designed to assist staff in providers helping older jobseekers to return to work. This report is about the guide and toolkit developed by TAEN for DWP. Based on interviews with staff in JCP and providers, accompanied by useful web stats.</p>	<p>Conclusion appear to be mainly based on interviews with staff rather than users though website stats add to this. It is likely to offer some useful pointers for how older jobseekers view online services and the sorts of support they prefer – and what tools staff need to deliver this.</p>
<p><b>G7.</b> (Included) DWP (2012) <i>How ready is JCP to help people in their 60s find work?</i></p>	<p>DWP IHR No 11</p> <p><a href="https://www.gov.uk/government/publications/how-ready-is-jobcentre-plus-to-help-people-in-their-60s-find-work-ihr11">https://www.gov.uk/government/publications/how-ready-is-jobcentre-plus-to-help-people-in-their-60s-find-work-ihr11</a></p>	<p>Jul 2012</p>	<p>An evidence collection which included focus groups with JCP advisers, an online survey of JCP staff, telephone interviews with claimants aged 55+ and with a group of large employers, plus a review of previous documentation.</p>	<p>The prospect of a growing over 60's customer base is behind this in-house research. It has the advantage that it looks at the issues from the staff and customer perspectives and should be able to offer some insights into the obstacles (internal and external) to helping older customers into work.</p>

<p><b>G8.</b> (Not Included) DWP (2012) <i>Extending working life: Behaviour change interventions</i></p> <p><i>Interesting review of secondary sources on extended working lives and how to encourage them (nudge theory is favoured) but all focused on those already in work.</i></p>	<p>DWP Research Report No 809</p> <p><a href="https://www.gov.uk/government/publications/extending-working-life-behaviour-change-interventions-rr809">https://www.gov.uk/government/publications/extending-working-life-behaviour-change-interventions-rr809</a></p> <p>Full and summary reports available</p>	<p>Sep 2012</p>	<p>This responds to the extending working life initiative and aims to understand how people make decisions on when and how to retire. A better understanding of people's retirement decisions will ensure policies to encourage working longer are as effective as possible and part of this is how older people can be encouraged back to the LM through PES services.</p>	<p>The study started in 2010 and took a while to reach print. It is largely based on secondary research but introduces behavioural science and even nudge theory into the subject. Looks like a useful adjunct to the more practically oriented studies.</p>
<p><b>G9.</b> (Not Included) DWP (2012) Preparing for an ageing society: Evaluation of the Ageing Well Programme Parts 1 &amp; 2</p> <p><i>The Ageing Well programme was very general in its approach with a main aim of getting local authorities to develop strategies to deal with an ageing demographic. But there is nothing on older jobseekers and few broader lessons for future policy to help people into work (or even stay in work).</i></p>	<p>DWP Research Report No 807</p> <p><a href="https://www.gov.uk/government/publications/preparing-for-an-ageing-society-evaluating-the-ageing-well-programme-parts-1-and-2-rr807">https://www.gov.uk/government/publications/preparing-for-an-ageing-society-evaluating-the-ageing-well-programme-parts-1-and-2-rr807</a></p> <p>Full and summary reports available</p>	<p>Nov 2012</p>	<p>Ageing Well ran from July 2010 to March 2012 to support local authorities in England to meet the challenges associated with an ageing population. This evaluation is aimed at seeing how the programme performed against its four key objectives.</p>	<p>Ageing Well was a wide-ranging programme and so not simply focused on older jobseekers but it may be able to provide some context for the way older workers and their advisers view labour market opportunities set against others (e.g. benefit, pension, etc.). Also the focus on local authorities could be instructive on how they engage with policy and the obstacles therein.</p>

<p><b>G10.</b> (Not Included) DWP (2012) <i>Outcomes of the Active at 60 Community Agents Programme</i></p> <p><i>The programme was aimed at older people close to or post retirement and focused on providing those perceived to be in need of help to be more active (but not in the work sense) and engage with society. There was no mention of employment related issues.</i></p>	<p>DWP Research Report No 808</p> <p><a href="https://www.gov.uk/government/publications/outcomes-of-the-active-at-60-community-agent-programme-rr808">https://www.gov.uk/government/publications/outcomes-of-the-active-at-60-community-agent-programme-rr808</a></p> <p>Full and summary reports available</p>	<p>Nov 2012</p>	<p>Evaluation of the Active at 60 Community Agents Programme – a small-scale (£1m) initiative to fund the vol/com sector to help those over 60 stay active, including in the labour market. The programme only ran for 9 months in 2011 but the small sums involved seemed to generate some sustainable initiatives.</p>	<p>While the grants were small and the support wider than just moving/ staying in work, the focus on what the vol/com sector can achieve is important, especially from the integration of these activities with those of the other local players such as local authorities and JCP.</p>
<p><b>G11.</b> (Not Included) DWP (2013) Local worklessness policy analyses case studies</p> <p><i>Not much use in that it just focuses on whether local analysis is done and concludes that there is a demand for local worklessness policy analysis. There are no separate case studies in the report (though some reference to each of the three in the text) and GM is mentioned as having a well-developed analytical approach with strong collaboration across the 10 local authorities – which should be even better now given that the report was written 5 years ago just as the GMCA and City Deal, etc. were starting.</i></p>	<p>DWP Research Report No 846</p> <p><a href="https://www.gov.uk/government/publications/local-worklessness-policy-analysis-case-studies-rr-844">https://www.gov.uk/government/publications/local-worklessness-policy-analysis-case-studies-rr-844</a></p> <p>Full and summary reports available</p>	<p>Jun 2013</p>	<p>Through a case study approach, the report looks at the increasing emphasis on localisation and the delivery of services through local and multi-agency partnerships. The implication is that local policies may make it difficult to share good practice because of the fragmentation.</p>	<p>The case studies were in three areas – Greater Manchester, Lewisham and Cornwall so relevant to the study. Also covers local policy developments and how they are or should be supported by national policy and institutions. There's no obvious age analysis of worklessness which might be a drawback.</p>



<p><b>G12.</b> (included) DWP (2014) <i>Work Programme Evaluation – Participants’ Experience</i></p>	<p>DWP Research Report 892</p> <p><a href="https://www.gov.uk/government/publications/work-programme-evaluation-participant-experience">https://www.gov.uk/government/publications/work-programme-evaluation-participant-experience</a></p> <p>Full and summary reports available</p>		<p>The report brings together and summarises the key evidence available from the different strands of the WP evaluation relating to the experience of participants. It looks at both pre-work and in-work provision and at variations in provision across the different sub-groups.</p>	<p>The WP was the main programme vehicle for a number of years and it is important to gain any knowledge from this. A potential problem is that any info on the over 50s may be difficult to isolate short of going back to the original source material. Around one-quarter of WP participants were over 45.</p>
<p><b>G13.</b> (Included) DWP (2015) - <i>A New Vision for Older Workers; Retain, Retrain, Recruit</i></p> <p>POSSIBLE FICHE</p>	<p>DWP – special report by Dr Ros Altmann CBE, Business Champion for Older Workers</p> <p><a href="https://www.gov.uk/government/publications/a-new-vision-for-older-workers-retain-retrain-recruit">https://www.gov.uk/government/publications/a-new-vision-for-older-workers-retain-retrain-recruit</a></p>	<p>May 2015</p>	<p>Commissioned by DWP the report looks at the value of older workers, barriers to working they face. Offers some useful ideas on how to overcome age discrimination in recruitment, etc.</p>	<p>The report is more about headlines than rigorous analysis but offers a useful exploration of the issues – both keeping older workers in employment and recruiting jobseekers. There might not be enough detail on the policies proposed.</p>
<p><b>G14.</b> (Not Included) DWP (2016) <i>Claimant service and experience survey 2015-2016</i></p> <p><i>The survey is focused on claimant satisfaction and does not offer any indications of links with job search, etc., and there is no analysis by age or area.</i></p>	<p>DWP Research Report No 916</p> <p><a href="https://www.gov.uk/government/publications/dwp-claimant-service-and-experience-survey-2014-to-2015">https://www.gov.uk/government/publications/dwp-claimant-service-and-experience-survey-2014-to-2015</a></p> <p>Full and summary reports available</p>	<p>Feb 2016</p>	<p>This is based on 14,918 telephone interviews in 2014/15 with people who were claiming working-age, disability, carer or pension-related benefits from DWP and had been in contact in the past three months.</p>	<p>While the broad responses on satisfaction would be useful in framing the services to jobseekers, there may not be any analysis by age group of customers.</p>



<p><b>G15.</b> (Included) DWP (2017) <i>Sector-based work academies and work experience trials for older claimants</i></p> <p><b>POSSIBLE FICHE</b></p>	<p>DWP Research Report No 938 Full and summary reports available</p> <p><a href="https://www.gov.uk/government/publications/sector-based-work-academies-and-work-experience-trials-for-older-claimants-combined-quantitative-and-qualitative-findings">https://www.gov.uk/government/publications/sector-based-work-academies-and-work-experience-trials-for-older-claimants-combined-quantitative-and-qualitative-findings</a></p>	<p>Feb 2017</p>	<p>Reports on trials for enhanced central funding for work experience and training for over 45s. Looks at reasons for take-up, impact, etc. Offers conclusions on policy effectiveness.</p>	<p>Based on trials of the two measures but offers some potentially useful impact assessment. Does not go into great detail about different ages within the over 45s.</p>
<p><b>G16.</b> (Included) DWP (2017) <i>Employers experience of recruiting and retaining older workers</i></p>	<p>DWP Research Report No 940 Includes full and summary reports and a slide pack.</p> <p><a href="https://www.gov.uk/government/publications/employer-experiences-of-recruiting-retaining-and-retraining-older-workers-qualitative-research">https://www.gov.uk/government/publications/employer-experiences-of-recruiting-retaining-and-retraining-older-workers-qualitative-research</a></p>	<p>Feb 2017</p>	<p>Qualitative study of employers' experience of recruiting and retaining older workers.</p>	<p>It offers a useful insight into how employers manage older workers, any policies used, how line managers operate in a mixed-age workforce. The policy ideas offered are rather broad.</p>
<p><b>G17.</b> (Not Included) DWP (2017) <i>DWP employer experience survey 2015-2016</i></p> <p><i>The survey was very general in scope with little information on older workers except for some indication of what values older recruits being (experience and reliability).</i></p>	<p>DWP Research Report 948</p> <p><a href="https://www.gov.uk/government/publications/dwp-employer-experience-survey-2015-to-2016">https://www.gov.uk/government/publications/dwp-employer-experience-survey-2015-to-2016</a></p> <p>Full and summary reports available plus data tables and methodological note</p>	<p>Sep 2017</p>	<p>Based on a telephone survey of 4,200 employers, this is used to gather feedback on employers' experience of DWP services but also looks at employer recruitment practices. There is a section on the recruitment of older workers and those with a long-term health condition or disability.</p>	<p>A wide-ranging survey of employers with a sample size that would not permit much disaggregation by area. Offers potentially useful pointers on employer attitudes to older workers/ jobseekers.</p>

<p><b>G18.</b> (Not Included) DWP (2018) <i>Greater Manchester Working Well: Early impact assessment</i></p> <p><i>There is insufficient clarity in the results for the age cohort 50+ though the results of the regressions are given for various age groups (50-55, 55-60 and 60-70) while the overall sample is 28% of the total, this gets rather small for the segmented age groups.</i></p>	<p>DWP Research report No 946</p> <p><a href="https://www.gov.uk/government/publications/greater-manchester-working-well-early-impact-assessment">https://www.gov.uk/government/publications/greater-manchester-working-well-early-impact-assessment</a></p> <p>Full and summary reports available</p>	<p>Jan 2018</p>	<p>Early impact assessment of the five-year pilot run by Salford City Council on behalf of GMCA aimed at Employment and Support Allowance (ESA) claimants in the work-related activity group and have completed the Work Programme. The conclusions seem to be variable for different sub-groups.</p>	<p>Includes only those participating in the first 17 months to August 2015 and so misses any longer-term effects. This was not a randomised trial so the impact assessment has been done post participation using propensity score matching to capture a control group.</p>
<p><b>Other government sources</b></p>				
<p><b>G19.</b> (Not included) BIS, <i>Fair Treatment at Work survey report</i></p> <p><i>The report provides useful baseline evidence for the LM situation pre removal of the Default Retirement Age (DRA) but the enhanced sample does not provide for locality evidence and has limited relevance to place-based action since it refers to a labour market situation where there was DRA.</i></p>	<p>Department for Business Innovation and Skills. Employment relations research series number 109. London</p> <p><a href="https://www.gov.uk/government/publications/the-fair-treatment-at-work-age-report-findings-from-the-2008-survey">https://www.gov.uk/government/publications/the-fair-treatment-at-work-age-report-findings-from-the-2008-survey</a></p>	<p>March 2010</p>	<p>Presents results from a boost sample (60+) to the 2008 survey, looking at the age results in the context of the findings from the main survey. The report includes data on problems at work, and awareness and perceived knowledge of employment rights. Limited relevance due to pre-removal of DRA.</p>	<p>Findings had an influence on the default retirement age review.</p>

<p><b>G20.</b> (Not included) DoH and DWP, <i>Psychological Well-being and Welfare: Improving Service Provision and Outcomes.</i></p> <p><i>The report a specialist but not specific (to 50+) review of the situation and potential for the specific situation of improving work and health outcomes for people with MH problems.</i></p>	<p>Department of Health, Department for Work and Pensions and Cabinet Office, Research report No.407</p> <p><a href="https://www.rand.org/pubs/research_reports/RR407.html">https://www.rand.org/pubs/research_reports/RR407.html</a></p>	<p>January 2014</p>	<p>A report from the Rand Corporation exploring proposals to improve employment and health outcomes for people with common mental health problems. Proposed providing timely access to coordinated treatment and employment support for a greater number of people with common mental health problems.</p>	<p>Recommendations were influential on (subsequent) 'Working Win and Thrive at Work' group work trials, and included: These included combining employment and mental health support; increasing integration between existing treatment and employment services and applying evidence-based models in new ways or a using combination of approaches.</p>
<p><b>G21.</b> (Not included) DFE, <i>Adult Participation in Learning Survey 2017</i></p> <p><i>The report provides baseline evidence for adult learning and some older people breakdowns but appears to be too general in its focus for value place-based action.</i></p>	<p>Department for Education and Government Social Research, London.</p> <p><a href="https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/735438/Participation_in_Learning_Survey_2017.pdf">https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/735438/Participation_in_Learning_Survey_2017.pdf</a></p>	<p>August 2018</p>	<p>Annual survey of adult learning – with 2017 survey of 5,039 over 17s looking at learning propensity, motivations and the barriers. Relevance is for wider skills policy and engaging adults who are historically least likely to learn.</p>	<p>Includes some segmented statistical analysis including for older people but not 'cut' at 50+.</p>
<p><b>G22.</b> (Not included) DFE, <i>Decisions of Adult Learners</i></p> <p><i>The report is based on a relatively small quali research exercise and there is no age-specific assessment of what might otherwise be valuable characterisations of adult learner types for value in place-based or other actions aimed at 50+ returners to work.</i></p>	<p>Department for Education and Government Social Research, London.</p> <p><a href="https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/742108/DfE_Decisions_of_adult_learners.pdf">https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/742108/DfE_Decisions_of_adult_learners.pdf</a></p>	<p>September 2018</p>	<p>Qualitative review of adult learners engagement and motivations conducted for DFE by Kantar Learning and Institute for Learning at Work. Defining six 'learner types' but with no analysis of any distinctive features for older learners.</p>	<p>-</p>

<p><b>G23.</b> (Not included) BEIS, <i>Removal of the Default Retirement Age (DRA): Post Implementation Review</i></p> <p>The report has value in setting out a technical (PIR) assessment of observed effects of the removal of DRA. Its focus is on 60+ and (mostly) 65+ impacts including for firms but with no specific relevance for setting place-based actions for 50+.</p>	<p>Department for Business Energy and industrial Strategy, London</p> <p><a href="http://www.legislation.gov.uk/ukxi/2011/1069/pdfs/uksiod_20111069_en.pdf">http://www.legislation.gov.uk/ukxi/2011/1069/pdfs/uksiod_20111069_en.pdf</a></p>	<p>September 2018</p>	<p>The PIR points to greater work opportunities for 65+ post removal of DRA, although the labour supply boost is smaller than expected. More 65+ are also remaining in work since the removal of the DRA with no systematic evidence of adverse effects on youth employment or (lower) workplace productivity. Costs to business appear to have been no more than minimal. Over half of employees are expecting to retire later than they did five years ago, mainly due to changes in the State Pension Age but a minority attribute this to their employer no longer having a fixed retirement age. A small share of employers were also attributed a small rise in their 60+ workforce to removal of DRA and there were thought to be wider positive effects on employers recognising the importance of retaining experienced staff.</p>	<p>The PIR concludes that the removal of the Default Retirement Age (DRA) has achieved its policy objectives. The PIR nonetheless acknowledges that measuring causal effects for these changes linked to the removal of DRA is problematic.</p>
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## B.3: Professional and institutional sources

Content Title/author	Source Details of Journal; Research Report; Working. Etc.	Date of publication	Relevance to RER Brief rationale for value/use	Notes
<b>P1.</b> (Included) EHRC, <i>Working Better, the over-50s, the new work generation.</i>	Equalities and Human Rights Commission, Manchester	2010	Follow up to the EHRC 2009 study	Meta-analysis
<b>P2.</b> (Included). TUC (2011), <i>Valuing the skills of older workers; How to do a mid-life development review.</i>	Trades Union Congress (TUC) and Unionlearn  <a href="https://www.unionlearn.org.uk/publications/valuing-skills-older-workers-how-do-midlife-development-review">https://www.unionlearn.org.uk/publications/valuing-skills-older-workers-how-do-midlife-development-review</a>	2011	Largely a practice guide but with some empirical evidence.	The guide contains a section for older workers but is said to be an all age guide.
<b>P3.</b> (Not included). CIPD (2012), <i>Managing a Healthy Ageing Workforce: A National Business Imperative.</i>  Not selected as an extended matrix because subsequent CIPD publications draw on this source and add a wider range of organisational evidence.	Chartered Institute of Personnel and Development. London	2012	The study (by Stephen McNair) sets out the business case for change, workplace myths to be addressed (and evidence to tackle these) and talent management approaches that can be geared to over 50s.	A study commissioned by the Scottish Centre for Healthy Working lives and CIPD harnessing secondary data, past research and additional focus groups including with employers/HR professionals.

<p><b>P4.</b> (Included). Age UK (2012), <i>Flexible employment: How employment and the use of flexibility policies through the life course can affect later life occupation and financial outcomes.</i></p> <p>Not selected for an extended matrix because much of the analysis is now dated and its lessons on flexible working have been more recently and fully explored in other publications (CIPD, BIM).</p>	<p>Age UK Research Report carried out by the School of Social Policy, Sociology and Social Research (University of Kent)</p>	<p>2012</p>	<p>A slightly dated review of flexible working options across the life course including relevance for over 50s.</p>	<p>Largely qualitative and literature review.</p>
<p><b>P5.</b> (Included). IACE (2012), <i>Older Peoples Learning.</i></p>	<p>National Institute of Adult Continuing Education (NIACE) Leicester</p>	<p>2012</p>	<p>Possibly the most up to date data-based assessment of 50+ learning strategies.</p>	<p>An enhancement to the NIACE annual survey of adult learning monitoring learning participation to focus on over 50s. This was able to contrast trends since 2006 (the previous enhancement survey). Report prepared by Stephen McNair.</p>
<p><b>P6.</b> (Not included). Age UK (2014), <i>Employment support for older unemployed people.</i></p> <p>Not selected for an extended matrix as this is now a largely out-dated analysis of support activities and superseded by later analyses.</p>	<p>Age U.K. and CESI, June 2014</p>	<p>2014</p>	<p>User-orientated mixed methods review of provision for older people out of work or seeking a return to the labour market.</p>	<p>Follow up to 2012 report.</p>

<p><b>P7.</b> (Not included). Ray, K., Sissons, P., Jones, K., Vegeris, S. (2014) <i>Employment, Pay and Poverty: Evidence and policy review, Employment, Pay and Poverty Evidence and Policy Review.</i> Joseph Rowntree Foundation, York.</p> <p>Not selected for an extended matrix as the age analysis focuses mostly on pensions poverty.</p>	<p>Joseph Rowntree Foundation, York</p>	<p>2014</p>	<p>All age review by a team from the (former) Policy Studies Institute; analyses have implications for older people in low-wage employment.</p>	<p>Meta-analysis of pay-poverty relationship. The focus has been largely on the low wage cycle and poverty effects across all age groups.</p>
<p><b>P8.</b> Included (see P12). BIC (2014), <i>The missing million: illuminating the employment challenges of the over 50s.</i></p>	<p>First of a three staged review and report process by Business in the Community (BIC), International Centre for Longevity-UK and The Prince's Initiative for Mature Enterprise (PRIME).</p>	<p>2014</p>	<p>Report (No1) from PRIME and BIC before (after 16 years of independent operation) it became integrated with BIC (since has stopped operations in England although remains active as a mentoring service in Wales).</p>	<p>The research draws on a range of largely secondary sources with some mini-case studies to profile causes of labour market exits and provides a review of policy leverage and restrictions on employment.</p>
<p><b>P9.</b> (Included – see P14). CIPD (2014), <i>Managing an age-diverse workforce: Employer and employee views</i></p>	<p>Chartered Institute of Professional Development, Report of Survey. London</p>	<p>2014</p>	<p>Survey-based assessment of age-friendly working practices.</p>	<p>Drawn on in the subsequent 2015 and 2016 reports. Older workers responses limited to those in employment. Integrated in the extended matrix linked to P14.</p>



<p><b>P10</b> (Not included). CAB (2014), <i>Fulfilling work: What do older workers value about work and why</i>.</p> <p>Not selected for extended matrix as focus is largely on internal labour markets and in-organisation implications for extending working lives.</p>	<p>Centre for Ageing Better, London</p>	<p>2014</p>	<p>Shows cross studies assessment of few differences between the preferences of older and young workers beyond health influences on decisions about continuing to work, more so than job satisfaction or job quality, and for some the value of flexibility at work to accommodate health or caring needs. Limited relevance to external support strategies for 50+ as the focus is on motivation of older people in work.</p>	<p>Literature review conducted by Institute of Employment Studies.</p>
<p>(Included – see P12). BIC (2015), <i>The missing million pathways back into employment</i>.</p>	<p>2nd report – prepared by same authors as the 1st - Franklin B, Beach B, and Bamford S, et al</p>	<p>2015</p>	<p>The 2nd report from BIC and PRIME extend the Report 1 analysis - includes a (short) analysis of implications for support services for re-engagement with work.</p>	<p>Harnesses data from the two-quarter longitudinal dataset of the Labour Force Survey (LFS) covering (2013-14) and from Wave 5 of the English Longitudinal Study of Ageing (ELSA) via UKDA.</p> <p>Integrated in the extended matrix linked to P12.</p>
<p><b>P12</b>. (Included). BIC (2015), <i>The Missing Millions: Recommendations for Action</i>.</p>	<p>3rd and concluding report – recommendations.</p>	<p>2015</p>	<p>Concluding report of the Missing Millions programme – although not including PRIME – an original partner.</p>	<p>Recommendations loosely set out for government and business.</p>



<p><b>P13.</b> (Included – see P14. CIPD (2015), <i>Labour Supply and the Ageing Workforce</i></p>	<p>Policy Report, Chartered Institute of Personnel and Development. London</p>	<p>2015</p>	<p>Relevant as the most current profession-based analysis and (loose) recommendations on age sensitive recruitment, selection, working and retirement practices, setting this in the context of rising challenges faced for skills shortfalls, productivity challenges and customer service expectations.</p>	<p>A CIPD – ILC-UK collaboration drawing on LFS and UKDA data to explore industry challenges of an ageing workforce and how to mitigate the risks. Integrated in the extended matrix linked to P14.</p>
<p><b>P14.</b> (Included). CIPD (2016), <i>Creating Longer, More Fulfilling Working Lives. Policy Report, Chartered Institute of Personnel and Development. London.</i></p> <p>Possible Fiche (with P9 and 13)</p>	<p>Policy Report, Chartered Institute of Personnel and Development. London</p>	<p>2016</p>	<p>The report offers a UK-comparative review (Czech Republic, Denmark, France, Germany, and UK) on working practice adjustments and the need for policy and practice reform in the UK.</p>	<p>The culmination of a CIPD research project (by IES) investigating how employers can best manage an increasingly older workforce in the context of their health and well-being and care responsibilities.</p>
<p><b>P15.</b> (Included). ACAS (2016), <i>Managing Older Workers.</i></p> <p>Not selected for extended matrix as focus is largely on in-organisation implications for managing those 50+ already in work.</p>	<p>ACAS Research Report (5/16), London</p>	<p>2016</p>	<p>A broadly based meta-analysis of challenges to working and management practices of an ageing workforce. Relevant if the ACAS '7 levers of productivity' are seen as a viable basis for changing management attitudes and practices.</p>	<p>The report looks at the context and likely impact of the extension of working life on UK employers, and sets this against adjustment needs for 'standard' approaches to HRM. It also assess the impact of HR policies and practices on older workers P14set against ACAS's 'seven levers of productivity'.</p>

<p><b>P16.</b> (Included). House of Commons (Women's and Equalities Committee).</p> <p>Not selected for extended matrix as contains no 'new' empirical evidence.</p>	<p>Older people and employment. Report of 4th session of Committee.</p> <p>C:/Users/Owner/Documents/CAB%20RER%20for%20over%2050s/Sources/HoC-Older%20People%20and%20Employment.pdf</p>	<p>2018</p>	<p>Cross-party 'state of play' committee report providing a range of policy</p>	<p>Broadly-based review taking evidence from various sources including researchers, and including an outreach session to engage older people in the community. Far reaching recommendations have been responded to since by Government and EHRC (Oct 2018 – see P19).</p>
<p><b>P17</b> (Not included) House of Commons (Work and pensions Committee)</p>	<p>Employment Support for Carers. 13th Report of Session 2017-19. HC581.</p> <p><a href="https://publications.parliament.uk/pa/cm201719/cmselect/cmworpen/581/581.pdf">https://publications.parliament.uk/pa/cm201719/cmselect/cmworpen/581/581.pdf</a></p>	<p>May 2018</p>	<p>Report of evidence and minutes of Select Committee review of employment related support for adults with caring responsibilities.</p>	<p>Broadly-based review which includes but goes well beyond eldercare responsibilities of older workers. Builds on the analysis previously conducted by Carers UK and Age UK (2016), <i>Walking the Tightrope: The Challenges of Combining Work and Care in Later Life.</i>"</p>
<p><b>P18</b> (Included) Age UK, <i>Helping 50+ Jobseekers Back to Work: Lessons for the UK Work and Health Programme.</i></p>	<p>Synthesis report and recommendations from Age UK. London <a href="https://www.ageuk.org.uk/globalassets/age-uk/documents/reports-and-publications/reports-and-briefings/active-communities/rb_nov16_work_and_health_programme.pdf">https://www.ageuk.org.uk/globalassets/age-uk/documents/reports-and-publications/reports-and-briefings/active-communities/rb_nov16_work_and_health_programme.pdf</a></p>	<p>2018</p>	<p>A report updating earlier reports from Age UK in 2013 (P4) and with CESI in 2014 (P6) with a particular focus on evidence-based lessons for improving job outcomes for over 50s in the Work and health programme being rolled out nationally in 2018.</p>	<p>An independent assessment of lessons from weaknesses in job outcomes for over 50s in Work Programme actions, and lessons for the successor Work and Health Programme. Of particular relevance to GMNCA as an early adopter of the new programme and with devolved powers to modify actions.</p>

<p><b>P19</b> (not included) House of Commons (Women's and Equalities Committee).</p>	<p>Older people and employment. Governments And EHRC Response to the Report of 4th Session of Committee. HC1585.</p> <p><a href="https://publications.parliament.uk/pa/cm201719/cmselect/cmwomeq/1585/1585.pdf">https:// publications. parliament.uk/ pa/cm201719/ cmselect/ cmwomeq/ 1585/1585.pdf</a></p>	<p>October 2018</p>	<p>Governments and EHRCs response to the Select Committee recommendations – no additional evidence.</p>	<p>The response details government's rationale for how existing policy and arrangements are (largely) addressing the Select Committee recommendations or are intended to do so. There are some response gaps pending a further response (not published at the time of writing) from EHRC.</p>
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## B.4: International sources

Content Title/author	Source Details of Journal; Research Report; Working. Etc.	Date of publication	Relevance to RER Brief rationale for value/use	Notes
<p><b>INT 1</b> (One included) European PES Network good practice examples drawn from 32 PES in the EU.</p> <p><i>Over 100 good practice examples are listed on the website, but few have any relevance to older jobseekers (the emphasis is on youth). One practice in Bulgaria has been referred to as of interest.</i></p>	<p>European PES Network website</p> <p><a href="http://ec.europa.eu/social/main.jsp?catId=1206&amp;langId=en">http://ec.europa.eu/social/main.jsp?catId=1206&amp;langId=en</a></p>	<p>2015-2018</p>	<p>The PES Network website lists well over 100 examples of good practice with a focus on issues such as supporting young people and the long-term unemployed, working with schools, and management methods.</p>	<p>Each listed good practice gives a high level of detail and, where available, outcomes from monitoring and evaluation. However, many will be more generally focused than just on older jobseekers, though general policies (e.g. segmentation of clients) could prove useful.</p>
<p><b>INT 2</b> (Not Included)  John P Martin (2014) <i>Activation and Active Labour Market Policies in OECD Countries: Stylized Facts and Evidence on their Effectiveness</i></p> <p><i>Study is too broad and without useful detail on age-related ALMPs</i></p>	<p>Institute for the Study of Labor, IZA Policy Paper No. 84</p> <p><a href="http://ftp.iza.org/pp84.pdf">http://ftp.iza.org/pp84.pdf</a></p>	<p>Jun 2014</p>	<p>The study looks critically at activation policies aimed at getting working age people off benefits and into work. Based on OECD countries' practices, it assesses the context of policies in terms of whether they are only effective when LM conditions are favourable.</p>	<p>A useful critical look at how ALMPs have done during and since the crisis, including an overview of the evidence on the effectiveness of them While not specifically focused on older jobseekers, there is useful assessments (including some country examples) of the effectiveness of key policies (especially for LTU) in particular countries. Also provides a useful references for follow-up.</p>

<p><b>INT 3</b> (Included)</p> <p>Werner Eichhorst 7 Regina Konle Seidl (2016) <i>Evaluating Labour Market Policy</i></p>	<p>Institute for the Study of Labor, IZA DP No 9966</p> <p><a href="http://ftp.iza.org/dp9966.pdf">http://ftp.iza.org/ dp9966.pdf</a></p>	<p>May 2016</p>	<p>The paper looks at evidence across numerous ALMP evaluations to determine how effective they are in helping shape policy and practice.</p>	<p>Offers a potentially useful window into how the 'activation regime' can help determine the effectiveness of measures, plus some ideas on regional issues.</p>
<p><b>INT 4</b> (Not Included) European Employment Policy Observatory (EEPO) of the European Commission DG EMPL</p> <p><i>The sources of information are somewhat scattered and too time- consuming to use for this study.</i></p>	<p>The main website is at:</p> <p>The catalogue of publications is at: <a href="http://ec.europa.eu/social/main.jsp?pager.offset=55&amp;">http://ec.europa. eu/social/ main.jsp?pager. offset=55&amp;</a></p>	<p>2010-2017</p>	<p>The EEPO provided expert support to the European Commission (DG EMPL) over a long period (since 1991 in its earliest incarnation) on labour market policy. This included maintaining a database (for EU use) and regular reports from experts in each MS on key policy developments.</p>	<p>There are two main sources here, the policy reports on each MS (and the composite reports across the EU) which are online, and the database which was intended for the EC only though with access for EEPO experts. This offers a potentially rich source of relevant policy options with some focused on older jobseekers.</p>
<p><b>INT 5</b></p> <p>EEPO Regular Reports on Labour Market Developments from SYSDM Correspondents</p> <p><i>Not yet assessed</i></p>	<p>Only available on EEPO intranet (Ken Walsh has access as the UK Correspondent/ Expert)</p>	<p>2014-2015</p>	<p>These annual reports for each MS cover the latest LM policy developments with Section 3 on a description of new policies or changes to existing policies. There is also a selective list of references which could offer some useful links to evaluation studies, etc.</p>	<p>The reports are concise, but it would be necessary to go through each one (28 in total) to determine if there were relevant policies, though the bonus could be a useful approach with relevant evaluations (where available).</p>

<p><b>INT 6</b> (Included) Peer Review (2012) <i>The role of public employment services in extending working lives</i></p> <p><i>The emphasis in the peer review papers is on those already in work and how to extend their working lives.</i></p>	<p>European Commission (available on EU portal – see above)</p>	<p>2012</p>	<p>A Peer Review on how PES can help jobseekers move into sustainable work with national policies from a range of PES (separate papers available) presented and discussed and with summary documentation</p>	<p>The Peer Review programme under the EC DG EMPL's Mutual Learning banner goes into details about the host PES policies and compares with other approaches. Includes expert papers drawing on evaluation where available and with transferability an important outcome considered.</p>
<p><b>INT 7</b> (Included) European Employment Observatory (EEO) (2012) <i>Employment policies to promote active ageing</i></p>	<p>European Commission DG EMPL (summary report not published but KW has access to it and (some individual national reports available on EU portal)</p>	<p>2012</p>	<p>A concise report on the current policies towards older jobseekers and workers including pensions, active measures, barriers to working, etc., for each EEA Member State plus a summary report (not published).</p>	<p>The series of reports have the advantage that they are focused on older workers and offer useful summaries of policies with statistics. The information is for 2012 and now a little dated though still potentially useful for ideas of what works.</p>
<p><b>INT 8</b> (Included) Eurofound (2013) <i>Role of governments and social partners in keeping older workers in the labour market</i></p>	<p>Eurofound research report <a href="https://www.eurofound.europa.eu/sites/default/files/ef_publication/field_ef_document/ef1323en.pdf">https://www.eurofound.europa.eu/sites/default/files/ef_publication/field_ef_document/ef1323en.pdf</a></p>	<p>2013</p>	<p>This report maps initiatives at national or sectoral level taken by governments and social partners to keep older workers in the labour market. Some measures involve financial incentives to work longer while others look at ways to enhance working conditions.</p>	<p>A potentially very useful source of broader information on policies for active ageing and a good overview of the use of ALMPs in targeting older and vulnerable groups on the LM. It has selected examples from various Member States.</p>

<p><b>INT 9</b> (Not Included) Eurofound (2017) <i>Towards age-friendly work in Europe: A life-course perspective on work and ageing from EU agencies</i></p> <p><i>The report is largely focused on those in work and how they can be supported to remain in work. There is a big emphasis on health and safety at work reflecting the input of the EU-OSHA in the report.</i></p>	<p>Eurofound research report <a href="https://www.eurofound.europa.eu/sites/default/files/ef_publication/field_ef_document/te-02-17-364-en-n.pdf">https://www.eurofound.europa.eu/sites/default/files/ef_publication/field_ef_document/te-02-17-364-en-n.pdf</a></p>	<p>2017</p>	<p>A report, coordinated by EU-OSHA, shows how information from four agencies can support policy-making that is both complementary and greater than the sum of its parts. The report draws on the agencies' expertise in each of their areas and covers the different challenges associated with the ageing workforce and considers innovative solutions.</p>	<p>Draws on the expertise of four EU Agencies in their respective areas such as health and safety (OSHA), VET (Cedefop) and pensions (EIGE). It discusses the policy challenges associated with the ageing workforce and considers innovative solutions. Present a useful and different take on the subject but lacks any detailed country examples.</p>
<p><b>INT 10</b> (Included) OECD (2011-2018) <i>Country case studies on age and employment</i></p> <p><i>Very detailed reports on each country. One recent example (Korea) has been included.</i></p>	<p>OECD publishing (on-line)</p> <p>Case studies currently available for: Korea, Japan, United States, Denmark, Poland, Switzerland, Netherminds, France and Norway.</p> <p><a href="http://www.oecd.org/employment/ageingandemploymentpolicies.htm">http://www.oecd.org/employment/ageingandemploymentpolicies.htm</a></p>	<p>2011-2018</p>	<p>A series of country reports on working better with age and fighting age inequality. Each report covers an assessment of where change and new approaches are needed to improve work incentives and employment opportunities for older age groups.</p>	<p>Based on a quick look at the report for the United States (2018) they offer relevant information though at around 150pp it may take some time to get to the most relevant material (though signposting is good). This example includes a specific section on employment programmes and older workers.</p>



<p><b>INT 11</b> (Not included) OECD (Various years) <i>Key policies to promote longer working lives</i></p> <p><i>Concise national reports mainly focused on those already in work. Section on employment assistance to older workers is limited in detail (based on assessment of Austria Report)</i></p>	<p>OECD publishing</p> <p>Separate reports for all EU Member States (and none for other OECD countries)</p> <p><a href="http://www.oecd.org/employment/ageingandemploymentpolicies.htm">http://www.oecd.org/employment/ageingandemploymentpolicies.htm</a></p> <p>Also available is an 'older workers toolkit' (basically a spreadsheet of policies by MS) aimed at social partners to help develop appropriate policies.</p>	<p>2007-2017</p>	<p>The reports look at the policies implemented to keep people in work and encourage older jobseekers back into the labour market.</p> <p>They cover a 10-year period and plot the evolution of policy and use available evaluations to appraise the value.</p>	<p>Based on a quick look at the report for Austria (which covers 2007-2017 and runs to 18pp) this offers a very useful and concise look at policy on ageing in the workplace. In particular there is a section on providing effective employment assistance to older jobseekers with various policies appraised. On the assumption that the other country reports are similar, this offers a useful source.</p>
<p><b>INT 12</b> (Not Included) <i>The German Employment Miracle</i> (via DWP)</p> <p><i>One measure (Perspektive 50 Plus) has been selected for a fiche under INT 6</i></p>	<p>Five measures related to older jobseekers:</p> <ul style="list-style-type: none"> <li>- Direct job creation.</li> <li>- <i>Perspektive 50 Plus</i> - regional employment pacts for older workers.</li> <li>- Integration Allowance paid to employers.</li> <li>- In-work credit paid to employers.</li> <li>- Marginal employment (midi-jobs).</li> </ul>	<p>2005 onwards</p>	<p>The paper summarises the key policies introduced over a long period to help the reintegration of older unemployed. Also provides contextual information on the economy, pension system and other factors likely to influence the transferability of any policy.</p>	<p>A useful overview of key policy initiatives with some evaluation insights and comparisons with UK policy.</p>



# Section C: 50+ Employment Support Rapid Evidence Review: Extended matrices

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**Preface:** The extended matrices are provided here for selected sources and presented for:

- Academic sources (C1)
- Governmental sources (C2)
- Professional and institutional sources (C3)
- International sources (C4).

Each is source is synthesised across two matrices with the first (C1.1, C2.1 etc.) looking at: i) location of intervention, ii) target groups and iii) evidence context, and the second (C1.2, C2.2 etc.) looking at iv) policy/practice context, v) evidence sources and quality and vi) transferability. Sources regarded as of special significance are identified as 'Fiches' and these are further documented in section D.

## Annex C1.1 – Academic evidence and contexts

No	Source	i): Location of intervention/ evidence etc.	ii): Target groups for intervention/ evidence	iii): Intervention/ evidence context
A1.	McNair, S. (2010) <i>A sense of a future: A study of training and work in later life</i> . National Institute of Adult Continuing Education. Leicester.	UK-wide study.	The target group was 50+ individuals in work although the collated data drew on a wider cross-section (all adults; in work and not economically active) for comparative evidence.	Brief description of policy, intervention or action, funding body/labour market institution and/or formation/delivery partners  An independently funded (Nuffield) study looking across two policy themes in 2010 - extending working life and raising (all ages) workforce skills to enhance economic performance. The study was delivered from a team at NIACE and cut across departmental policy briefs and was not allied to any specific department or LM agency.
A3	McNair, S. (2011) <i>Older people and skills in a changing economy. Briefing Paper Series, UK Commission for Employment and Skills</i> .	A cross UK review.	The target group was all older individuals in work or seeking work of 50+. These were not taken as a heterogenous group and comparisons were drawn where possible with sub-groupings to draw out distinctions in age and age-occupational contrasts from previous research by McNair and others.	One of a series of briefing papers produced for UKCES to assess challenges for disadvantaged groups in the economy.
A5	CLES (2011), <i>Barriers to Employment in Blackburn with Darwen for People aged 50+</i> , CLES Consulting. Manchester	An early review by CLES specific to Blackburn with Darwen.	50+ residents in this local labour market in and out of work.	Barriers-centred review for the Blackburn and Darwen Strategic Partnership and the Blackburn 50+ Partnership.

<b>A6</b>	Devins, D. Bickerstaffe, T. Nunn, A. and Mitchell, B. with McQuaid, R. and Egdell, V. (2011), <i>The role of skills from worklessness to sustainable employment with progression</i> . Evidence Report 38. UK Commission for Employment and Skills (UKCES), London	A cross UK review but including a broader review of skills interventions and policy in the UK and abroad. Includes (all age) international case studies for Australia, Denmark, Germany and USA.	All age analysis – not specific to 50+ but with separate sub-sections reviewing low pay and age effects, and some evidence on skills and training practices for older workers of 50+.	One of a suite of studies for UKCES reviewing the evidence on the role played by upskilling in supporting transitions from worklessness to sustainable employment with progression potential. It also included a review of the quantity and quality of low paid work and the nature and outcomes of skills policy and effective interventions.
<b>A8</b>	Geuskens G, Oude Hengel K M, Koppes L and Ybema J F (2012), 'Predictors of the willingness and the ability to continue working until the age of 65 years'. <i>Journal of Occupational Environmental Medicine</i> , 54(5), pp. 572-8	Data drawn from Netherlands cohort study.	Data drawn from cohorts of older workers from 45+.	A longitudinal analysis aimed at establishing socio-psychological predictors of the willingness and ability of older workers to continue working until the age of 65.
<b>A9</b>	TAEN (2012), <i>ESF Projects Successfully Engaging with the Over 50s</i> . The Age and Employment Network. London	UK study of six place-based actions funded under ESF.	Participants in selected ESF projects centred on older people.	A case study based approach to reviewing effective processes for mainly voluntary sector responses to helping older individuals re-engage with the labour market.
<b>A13</b>	Ng, T. & Feldman, D. (2012) 'Evaluating Six Common Stereotypes about Older Workers with Meta-Analytical Data.' <i>Personnel Psychology</i> , 65(4): 821-858.	Cross national review of over 400 empirical studies.	Centred on all-age (and self) perspectives of older worker characteristics.	The study aims to test age stereotype validity against a background of a more age diverse workforce. Its focus is more on the psychological dimension of building more positive working relationships in an increasingly multigenerational workforce.

<b>A14</b>	Pagán R (2012), <i>'Transitions to part-time work at older ages: the case of people with disabilities in Europe'</i> . Disability and Society, 27(1), pp. 95-115	A cross-EU analysis.	Target groups are disabled and non-disabled older people (+50) in part time work.	Study is focussed on propensity to stay in part-time work for disabled people – on the assumption that disability may mean workforce engagement for many will be limited by aspiration or ability to part-time roles.
<b>A15</b>	Canduela J, Dutton M, and Johnson S, et al (2012), <i>Ageing, skills and participation in work-related training in Britain: assessing the position of older workers</i> . Work Employment and Society; <b>26</b> :42-60. Sage, London.	A UK-based review but without and reduced level analyses.	Individuals in and out of work who are over 50.	An update to earlier research (Taylor and Unwin, 2003) set against policy measures to encourage older workers to stay in the labour market, with improving access to training a particular priority.
<b>A18</b>	Parry S and Mallett O (2014) <i>Motivation for later-life entrepreneurship</i> . Newcastle University Business School: Discussion Paper.  <b>FICHE</b>	Wider literature from international sources with a small-scale UK-based qualitative study	Focussed on a comparative analysis for older age self-employment and entrepreneurship (over 45s).	One of few sources with empirical evidence (albeit small-scale) on older age self-employment and entrepreneurship as a possible route into extended working lives.
<b>A22</b>	Hyde M and Philipson C (2015), <i>How can lifelong learning, including continuous training within the labour market, be enabled and who will pay for this?</i> Government Office for Science. London.	All UK analysis.	An all age review but with a focus on ageing implications for participation and funding in lifelong learning with separate breakdowns in activity data for 50-59 and 60+.	Part of the governments evidence review in the programme on Future Foresight of an Ageing Population. See also A27 for an aligned study.
<b>A23</b>	Watts J and Mcnair S, et al ((2015), <i>Mid-life career review: Pilot project outcomes</i> . Evaluation study published by National Institute of Adult Continuing Education (NIACE) Leicester.	All England – although specific pilots often had a more specific geographic, sectoral or occupational focus.	The pilots all targeted 45-65 year olds both in work and seeking employment.	The pilots aimed to fill an important evidence gap on the role of information, advice and guidance (IAG) support to individuals in building more sustainable working life decisions and practice in older age.

<b>A29</b>	Marvell R and Cox A (2016), <i>Fullfilling work: what do older workers value about work and why?</i> Centre for Ageing Better, London	UK-focussed assessment	Over 50s with a particular focus on those in work	Set against the wider context of an ageing population of working age, demographic deficit and policy promoting extension of productive working lives.
<b>A35</b>	Vickerstaff S et al (2017), <i>Exploring Retirement Transitions</i> . Research report from the ILC-UK and the Uncertain Futures research consortium.  <b>FICHE</b>	UK-based with some evidence drawn from USA.	The evidence is drawn from an all-age life-cycle approach but with a focus on outcomes for older people and especially those approaching SPA.	A research report set against the background of ILC-UKs evidence which suggests around 1 million older people are involuntary exits from the workforce who have yet to reach pensionable age.
<b>A36</b>	WHERL (2017), <i>The Wellbeing, Health, Retirement and Lifecourse Project</i> . Final report of the research programme. Kings College London.	UK only.	Broad older age focus but with particular emphasis on people working up to and beyond State Pension Age (SPA).	The WHERL project was set against a the background of uncertain effects of public policy initiatives such as raised State Pension Age, 'Fuller working Lives' and the removal of default retirement ages. Its focus has been a concern of risks that policy responses which fail to recognise individual differences in labour market histories, health and sociodemographic characteristics, and the way that these can influence the outcomes of such policies, may exacerbate existing inequalities.
<b>A38</b>	Murray M (2017), <i>Spotlight on Lifelong Learning for an Ageing Workforce</i> . 2nd Spotlights Project Report from Skills Commission, March 2017.	UK only	Specific focus on over 50s in work and seeking work up to SPA	Adopts a specific focus on learning and skills development for over 50s – supply and demand. Limited additional evidence as draws across other sources but sound synthesis.

A40	Wilkinson L and Pike T (2018), <i>The Evolving Retirement Landscape</i> . Report published by the Pension Policy Institute, London	A UK-based analysis.	Focus is on retirement planning and disposable income for 55+ but with a wider life-cycle approach.	A review of implications arising from pension flexibilities introduced in April 2015, and long term consequences for working life choices.
A41	Phillipson C, Shepherd S, Robinson M and Vickerstaff S (2018), <i>'Uncertain futures: Organisational Influences on the Transition from Work to Retirement'</i> . Social Policy in Society.	A UK-focussed assessment but drawing on research evidence also from Denmark, Netherland, Germany and others.	Focus on older worker options and how these are mediated by organisational working practices and work-environment factors.	Set against various public policy responses to the so called pensions timebomb.
A44	Brown J, Katikireddi S V, Leyland A H, McQuaid R W, Frank J, Macdonald E B (2018), <i>'Age, health and other factors associated with return to work for those engaging with a welfare-to-work initiative: a cohort study of administrative data from the UK's Work Programme'</i> , <i>BMJ Open</i> , 8(10), e024938  <b>FICHE</b>	Scotland only.	Beneficiaries in Scotland on the UKs 'Work Programme' – all age sample used to contrasts ageing effects on return to work propensity	The cohort study focussed in particular on contrasting outcomes for JSA and ESA clients in the Work Programme to assess age effects within different activity regimes, and effects of multiple morbidities.
A46	Wilson S, Marvell R, Cox A and Teeman D (2018) <i>Evaluation of the Carers in Employment (CiE) Project: Final report</i> . Social Care Institute for excellence and Institute of Employment Studies. London.	England only – limited to specific piloting areas (9 LAs) for the pilot project.	Participants in the CiE project – not limited to older employees.	IES evaluation of the government-funded Carers in Employment (CiE) project (2015 to 2017) with evidence of 'what works' in supporting carers to remain in or return to employment; limited to nine local authorities in England.

## C1.2: Extended matrix – Academic evidence and contexts

No	Source	v): Policy/evidence context	v): Evidence source and quality	vi): Transferability
A1	McNair, S. (2010) <i>A sense of a future: A study of training and work in later life</i> . National Institute of Adult Continuing Education. Leicester.	The 'policy' focus was on training and skills development among older people. It was a contextual study not geared to any specific training intervention but looking across both external and internal labour market actions. Its focus throughout was on the comparative position of older workers – and those seeking work in this age group.	Multi-source study harnessing a systematic literature review, 6 national datasets (including SEPP 2005), a large survey of individuals and interviews with individuals and employers. The sample size (15,100 – over 19s) was large enough to differentiate activity, skills groupings and LM status and to reliably map contrasts in training behaviour and attitudes between over and under 50s, and in different age cohorts of the over 50s. The main limitation is the use of older data sets for the employers (2005).	Brief assessment of relevance and likely transferability of action/evidence for place-based actions for 50+ employment support  A watershed study of the 50+ training dimension showing a mismatch between both employee and employer perspectives (and experience) of training and training needs among older people and underpinning policy views of an underskilled, reluctant to train, low training engagement 50+ group. The evidence suggests scope for segmenting the over 50s by training capability groups. It also suggests that the small (c.4% at age 50) underskilled 50+ group are the least likely to receive training. The study doubts that training specific interventions for 50+ unemployed are likely to be effective unless part of wider programme activities which include job placements.



<b>A3</b>	McNair, S. (2011) <i>Older people and skills in a changing economy</i> . Briefing Paper Series, UK Commission for Employment and Skills.	This was an evidence-based review against a familiar policy context of a demographic deficit and deteriorating dependency ratio, a shrinking population of traditional “working age” and government policy aimed at encouraging longer working lives set against changing skills demands for which some may not be well prepared.	This was a multi-source review harnessing a wide range of existing data sets alongside a systematic literature review, and using also UKCES’s NESS data on employer practices and skills needs.	There is no specific policy analysis in this review. Its value is with its policy challenge diagnoses – to counter age discrimination (recruitment) for the 50+ out work whatever their skills and educational attainment, early exists from ill health and disability – and challenges for early diagnosis, and active support/negotiation of modified employment and job change (when current job is unsustainable), and responding to the underemployment of 50+, and waste of talent. McNair set this, and broad policy proposals, against changing dynamic for skills and employment practice in the UK – often adverse to quality in 50+ employment opportunity proposes. There appear to be no proposals which are specific to place-based responses but with wider implications.
<b>A5</b>	CLES (2011), <i>Barriers to Employment in Blackburn with Darwen for People aged 50+</i> , CLES Consulting. Manchester	Situatated programme review of active and passive constraints to employment and to counter under-employment in locality of 50+ residents.	Largely qualitative review emphasising ‘lived’ and programme experiences. Further information not available since report is not accessible from Partnership.	Transferable evidence is unclear (report not available from Partnership) but its qualitative focus appears to have been superseded by the CLES 2017 review for all GM.



<p><b>A6</b></p>	<p>Devins, D. Bickerstaffe, T. Nunn, A. and Mitchell, B. with McQuaid, R. and Egdell, V. (2011), <i>The role of skills from worklessness to sustainable employment with progression</i>. Evidence Report 38. UK Commission for Employment and Skills (UKCES), London</p>	<p>This was an all age analysis conducted as part of the (then) National Skills Research Strategy to map evidence on policy, practices and effectiveness of upskilling as a lever in supporting transitions from worklessness to sustainable employment. This was placed in a wider LM context including the low pay-low skills cycle and both governmental policy and workplace practices.</p>	<p>This was a broadly based literature review focussed on evidence 2005-2011. It included a number of previously analysed data sets including for (available) age distributions). An e-consultation was conducted with 'experts' to validate the search and conclusions.</p>	<p>Useful and thorough scene setting piece which compliments past syntheses. Value for 5)+ in setting out rising incidence of low pay by age – intensifying especially for 50-59s since mid-90s, and also value of integrated approaches in skills interventions with 50+ to include active IAG (to offset loss of self-confidence and reorient to 'new' labour market and local opportunities to help overcome age discrimination in recruitment. Also notes that German research showing hiring subsidies for older job seekers had positive impacts only for very specific groups (women in East Germany). Overall, the search evidence is now too dated to be of direct value to this review.</p>
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<b>A8</b>	Geuskens G, Oude Hengel K M, Koppes L and Ybema J F (2012), ' <i>Predictors of the willingness and the ability to continue working until the age of 65 years</i> '. Journal of Occupational Environmental Medicine, 54(5), pp. 572-8	Evidence focus only on unpicking predictors of willingness to work among older people up to 'normal' retirement age.	A longitudinal study of older participants (45-63) in the Netherlands Working Conditions Cohort Study (N=4,937) using logistic regression analyses.	The results showed that predictors of lower motivation to work to 65 were emotional exhaustion, work handicap, higher physical and emotional demands, lower supervisor's support. There was some evidence that intermediate satisfaction with salary also predicted a lower likelihood to be able to continue working. The evidence suggested that interventions for extending working motivation could focus on prevention of emotional exhaustion and promotion of a healthy social work climate. The study is wholly Netherlands based and now dated and of limited relevance to this review.
<b>A9</b>	TAEN (2012), <i>ESF Projects Successfully Engaging with the Over 50s</i> . The Age and Employment Network. London	Diverse and mainly localised initiatives (one sector-based) typically of limited scale.	Uncertain methodology but aimed at providing for a limited (six ESF schemes) review of effective practices. Centred mainly on reflections on effective processes (e.g. stakeholder and networks engagement, keep it local, keep it inclusive, etc.); impact evidence limited to single personalised case studies in each scheme.	The review produces a checklist of 'how to' actions for place-based schemes but this is presented at a high level and with from a evidence base. May have relevance as a guide to place-based actions where providers have a client-focussed approach and with substantial discretion in delivery.

<b>A13</b>	Ng, T. & Feldman, D. (2012) <i>'Evaluating Six Common Stereotypes about Older Workers with Meta-Analytical Data.'</i> Personnel Psychology, 65(4): 821-858.	Looking at 'overgeneralized expectations' (age stereotypes) and beliefs (positive and negative) about age-based characteristics of individuals in the workplace.	The study harnesses past empirical evidence 418 empirical studies; N= 208,204) to critical review the empirical basis of 6 common age stereotypes (a) less motivated, (b) generally less willing to participate in training and career development, (c) more resistant and less willing to change, (d) less trusting, (e) less healthy, and (f) more vulnerable to workfamily imbalance. These were extended to a content domain of 39 variables representing stereotype assumptions and traits.	The study is widely cited as debunking negative age stereotypes. The only empirically consistent stereotype was that older workers are less willing to participate in training and career development activities – although this is at odds with more recent evidence (e.g. McNair 2011). The paper sets out some implications for management practice at the workplace but has limited direct value for place-based actions in the UK – it is cross-culture, includes some very dated empirical studies and has little practical application for external labour market actions beyond marketing issues to encourage entry and placements.
<b>A14</b>	Pagán R (2012), <i>'Transitions to part-time work at older ages: the case of people with disabilities in Europe'</i> . Disability and Society, 27(1), pp. 95-115	One of the few published analyses of the relationship between reductions in working time in later life and physical and mental disability.	The analysis uses the two first waves (2004 and 2007) of the EU Survey of Health, Ageing and Retirement in Europe to compare transitions between employment statuses for disabled and non-disabled individuals. It includes controls for different disability trajectories, using multivariate analysis to examine the likelihood and determinants for remaining in part-time work in 2007 for those individuals who were part-timers in 2004.	This paper has an unusual focus on the labour-force transitions of older workers with disabilities. It shows that older people with long-term disabilities have a higher probability of staying in a part-time job than non-disabled counterparts (in part-time work). The authors suggests this means policy needs to promote part-time work as a means of reducing worklessness and under-employment for older workers with disabilities and support progressive retirement opportunities. Beyond this the paper has limited relevance for place-based actions.

<b>A15</b>	Canduela J, Dutton M, and Johnson S, et al (2012), <i>Ageing, skills and participation in work-related training in Britain: assessing the position of older workers</i> . Work Employment and Society; <b>26</b> :42-60. Sage, London.	The study is set against a background of policy assumptions that encouraging older workers to main economically active needs to be accompanied by access to work-training to redress the skills legacy of age-based imbalances. It re-assesse if the earlier analysis (on 1997 data) remained valid for assumptions that older workers are less likely to participate in training, and more likely to have never been offered training by employers.	Uses the same dataset as for the 1997 data (Labour Force Survey - LFS) with data 2007-9; modelling the data to assess if age remained a predictor of inequalities in training for the over 50s.	The authors find that earlier assumptions remain valid, and that inequalities in training participation ay have intensified. This is notable for men over 50 who were least likely to have been offered recent training by employers. A polarization of opportunity is suggested in accessing jobs offering training and progression. This is significant for place-based action only in confirming currency of assumptions (at 2009) 'active ageing' policies need to challenge (assumed) negative employer attitudes to training for older workers.
<b>A18</b>	A18. (Included). Parry S and Mallett O (2014) <i>Motivation for later-life entrepreneurship</i> . Newcastle University Business School: Discussion Paper.  <b>FICHE</b>	The policy context was assessing self-employment orientation as a later life work transition.	Uses a meta-analysis drawing on past empirical evidence and a small number of (new) case studies to look at self-employment motivations after 45 – and contrasts with younger and mid-age individuals.	Centred on older age self-employment and entrepreneurship; its main focus is on explaining why entrepreneurship and s/e increases with age up to 35 to 45 years, falling after. They look at different orientations and participation after 45 and enablers/. constraints and define a particular activity group which they refer to as 'privileged' entrepreneurs. The paper offers useful additional insights into s/e as a later life option.

<p><b>A22</b></p>	<p>Hyde M and Philipson C (2015), How can lifelong learning, including continuous training within the labour market, be enabled and who will pay for this? Government Office for Science. London.</p>	<p>Part of a wider foresight study commissioned by government to review engagement in lifelong learning, how it can be supported and who will pay for it to 2040.</p>	<p>Drawing on multiple sources for participation and demographics. It includes state of play analysis of engagement and trends (1997-2011 data) and parallel literature and data on learning-health data to model a prospective analysis to 2025 and 2040.</p>	<p>Updates earlier ageing and learning data (NIACE, 2011). It shows a sharp decline (2005-10) in all age group participation, intensified for over 50s (and especially 60+ and suggests older workers are less likely to request work-related learning. It highlights the health benefits of lifelong learning (individuals and society). The data will be relevant to any activation measures which include a stimulus to formal learning.</p>
<p><b>A23</b></p>	<p>Watts J and Mcnair S, et al ((2015), <i>Mid-life career review: Pilot project outcomes</i>. Evaluation study published by National Institute of Adult Continuing Education (NIACE) Leicester.</p> <p><b>FICHE</b></p>	<p>One of the few recent UK studies focussed on older age active measures centred on IAG (career) interventions. Provides an evidence-based review of the BIS funded programme of 'mid-life' career reviews (the Mid Life Career Review (MLCR) Project) which included 17 (different) pilots which covered delivery to 3,000 people variously through face-to-face IAG (individually and in groups), over the phone, and online, and by National Careers Service Contractors, Unionlearn and VCS partners.</p>	<p>Research evidence included broadly based survey and interview evidence. Impacts were assessed for clients, advisors, providers to the programme pilots, employers and for partners.</p>	<p>Findings showed significant attitudinal and behavioural client gains with positive outcomes for earlier return to work (after unemployment), into self-employment, negotiating more flexible working conditions, and finding appropriate training to improve their employability. The positive findings were not followed by a roll-out of the initiative but an place-based active aging programme including IAG elements could draw significant evidence of effective processes and delivery models from this evaluation. In particular it noted that most clients were surprised to find such a service was available and among recommendations it was proposed that a mainstreamed initiative would need effective branding and promotion.</p>

<p><b>A29</b></p>	<p>Marvell R and Cox A (2016), <i>Fullfilling work: what do older workers value about work and why?</i> Centre for Ageing Better, London</p>	<p>Geared to a cross-policy evidence based debate on enabling more people aged 50 years and over to be in fulfilling work that supports a good later life.</p>	<p>Evidence from secondary and published sources from a rapid evidence review (Institute of Employment Studies) of work motivations in later life and how this contrasts with younger workers.</p>	<p>The study isolates the (few) differences between the work motivations of older and young workers (i.e. health adjustments, flexibility at work, positive organisational values, workplace autonomy). Some relevance to place-based where active measures provide for work placements with sustainable potential or other actions which require guidance to employers on retaining older workers.</p>
<p><b>A35</b></p>	<p>Vickerstaff S et al (2017), <b>Exploring Retirement Transitions.</b> Research report from the ILC-UK and the Uncertain Futures research consortium.</p> <p><b>FICHE</b></p>	<p>A research report set against the background of the Cridland Review (2017), SPA changes and policy encouragement to extend working lives. It looks at the nature of changing expectations and employment practices around retirement transitions and implications for personal support, employment practices and how these align with current policy perspectives and measures.</p>	<p>Evidence is drawn from multiple sources but especially: some primary data (e.g. ELSA/HRS data) from the UK and US; a literature review; and secondary sources from the "Uncertain Futures" consortium.</p>	<p>The evidence may be relevant to place-based actions where there is concern to ensure that person-vacancy/ placement or opportunity matching are age-sensitive forms including to appropriate flexible work. It will also be relevant if initiatives are concerned with support for adjusted work within 'bridge' or progressive approaches to retirement for which the research suggests opportunities are being exaggerated.</p>

<b>A36</b>	WHERL (2017), <i>The Wellbeing, Health, Retirement and Lifecourse Project</i> . Final report of the research programme. Kings College London.	Set up against the background of public policy developments including increases to the State Pension Age, removal of default retirement ages, and the Government's 'Fuller Working Lives' and 'Age Positive' initiatives. The research recognised that these and associated policy reforms affect millions of people, yet their implications for health, wellbeing and financial circumstances are unknown.	This concluding report draws together past evidence, discussions and analysis to provide an evidence-base for the risks that policy responses which fail to recognise individual differences in labour market histories, health and sociodemographic characteristics, and the way that these can influence the outcomes of such policies, may exacerbate existing inequalities. It has drawn on a very wide range of data – historic and more recent trend analyses, WHERL and other research to take a life-cycle approach to assessing drivers affecting the likelihood that individuals will work up to and beyond State Pension Age, and the impacts on them (health, wellbeing and financial circumstances).	An important watershed study also setting out implications for policy makers and practice. A novel analysis is of retirement reversals which may be a feature of extending working lives and changing circumstances (from 1991 to 2015 a quarter of older adults un-retired within 15 years of first leaving the labour market and calling themselves 'retired'). This may be an additional and distinctive dimension of employment support for place-based initiatives aimed at those 50+ out of work or returning to work.
<b>A38</b>	Murray M (2017), <i>Spotlight on Lifelong Learning for an Ageing Workforce</i> . 2nd Spotlights Project Report from Skills Commission, March 2017.	Centres on lifelong learning policy and practice contexts for over 50s against a background of (mapped) public policy initiatives and demographic impetus since 2007.	A cross-source review drawing on past literature and evidence from other data-based research studies, providing a composite analysis of learning supply and demand for 50+. Adds no new data but provides cross-cutting insights and public policy recommendations from the well linked cross-institutional 'Skills Commission' initiative.	Evidence is predominantly drawn from national and home country existing sources and few place-based studies. The (broad) recommendations may have some place-based relevance including a section on business benefits which can be used for 'business case' rationales.



<b>A40</b>	Wilkinson L and Pike T (2018), <i>The Evolving Retirement Landscape</i> . Report published by the Pension Policy Institute, London	Centred on pension flexibility reforms of 2015, with older people having greater flexibility in access to Defined Contribution (DC) pension savings after age 55. The freedoms are recognised to also open up complexity and risk to sub-optimal decisions with the potential to have a significant negative impact on their retirement outcomes.	The report is one of two (to follow) mapping changes and consequences using PPI and other modelling of impacts of choices.	An informed analysis of the flexibilities options and risks for individual choices in different working circumstances. Probably of marginal significance for place-based support initiatives unless extending into areas of financial advice or coping with (re-employment/de-retirement) resulting from sub-optimal choices.
<b>A41</b>	A41. Phillipson C, Shepherd S, Robinson M and Vickerstaff S (2018), <i>'Uncertain futures: Organisational Influences on the Transition from Work to Retirement'</i> . Social Policy in Society.	The research is set against a policy backdrop of the abandonment of the default retirement age, incremental increases in SPA, and ageism added to workplace anti-discrimination laws. This is seen to be (potentially) changing (long held) assumptions about the age of retirement yet uncertainty how older people will chose to respond and how workplace practices will be managed.	The evidence is drawn from qualitative case studies of large UK-based organisations with data drawn from employees (focus groups), line managers, occupational health staff and HR managers.	An internal LM focus although data on older employee aspirations are significant in showing a high degree of uncertainty and ambivalence on desirability and feasibility of extending working life, and wide variations in how older workers are managed within workplaces, and a gap between policies and practices. Not likely to be relevant to place-based actions unless these also include actions which require guidance to employers on retaining older workers.



<p><b>A44</b></p>	<p>Brown J, Katikireddi S V, Leyland A H, McQuaid R W, Frank J, Macdonald E B (2018), '<i>Age, health and other factors associated with return to work for those engaging with a welfare-to-work initiative: a cohort study of administrative data from the UK's Work Programme</i>', <i>BMJ Open</i>, 8(10), e024938</p> <p><b>FICHE</b></p>	<p>The policy context was looking at the all age focus to the Work Programme to assess any contrasting effects on return to work (successful outcomes and duration to outcome) and in particular to unpick health and associated age-related influences and remedial strategies for policy makers.</p>	<p>A refined statistical analysis of administrative data in cohorts (N=13,318 clients 18-64 years) of Work Programme clients and variations by benefit type (JSA and ESA). Adopting Piecewise Poisson regression analysis to calculate incident rate ratios using data from 2013 to 2016.</p>	<p>The study provides a recent analysis of age effects within the national programme, and differentiation by universal actions (JSA) and support to those with chronic illness and disability (ESA) to investigate the role of individual factors (including age, health and personal circumstances) and external factors. Its focus looked at both achieved starts and the time to first job start after entering the programme (JSA clients 62% more likely to return to work (RTW) than ESA clients with a strong negative relationship between age and the predicted outcome. Results also suggested any age specific support programmes may be improved by providing integrated interventions which focus on health and "biopsychosocial" factors to enable more people to realise the potential health benefits of returning to work.</p>
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<p><b>A46</b></p>	<p>Wilson S, Marvell R, Cox A and Teeman D (2018) <i>Evaluation of the Carers in Employment (CiE) Project: Final report</i>. Social Care Institute for excellence and Institute of Employment Studies. London.</p>	<p>This report focussed on an initiative to trial and better understand effective actions to support carers to remain in or return to employment, co-ordinated by the Social Care Institute for Excellence (SCIE). It included actions centred on IAG to carers; advice on assistive technology, and employer measures such as raising awareness of the opportunities for, and the challenges of, support employed carers.</p>	<p>Evaluative study conducted independently by IES across none LAs involved in the trials. Offering insights on employer practices and gaps with evidence-based proposals for more supportive workplace cultures and reducing conflict between staff over work adjustments. All age based analysis with little specific evidence centred on 50+ carers.</p>	<p>The report provides insights on carer-friendly HR policies and practices for different types of employers, carer assessments; and the identification of 'hidden' carers. These are likely to have general relevance for all carers – and as such older workers but the lack of differentiated analysis by age means it has limited transferability to place-based initiatives.</p>
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## C2:1 Extended matrix – Selected Governmental evidence and contexts

No	Source	i): Location of intervention/ evidence etc.	ii): Target groups for intervention/ evidence	iii): intervention/ evidence context
<b>G1</b>	DWP/BIS (2010) <i>Second survey of employers' policies, practices and preferences relating to age, 2010</i> , Employment Relations Research Series No 110 (Metcalf H and Meadows P)	The report is based on a survey of over 2,000 establishments (with at least 5 employees) in GB between October 2009 and January 2010. There was no sub-national breakdown of the results.	Enterprises in GB across all sectors and occupational categories. Some broad segmentation by occupational groups. Results mostly focused on this aged 60+ since this was where most age discrimination was detected.	The report is not focused on a policy and is mainly concerned with older workers already in employment. However, it does offer some insights into recruitment practices for older workers that could be instructive for future policy development.
<b>G2</b>	DWP (2010) <i>50+ back to work evidence review and indicators guide for secondary analysis</i> DWP Research Report No 615 by Policy Studies Institute (PSI)  <b>FICHE</b>	Report examines back-to-work support for over 50s using: review of policy developments and academic research; DWP reports and papers (2000-2008); and datasets. Covers GB, without any sub-national analysis.	While the focus in 50+ it also looks at programmes covering wider age cohort where the 50+ also have patriated.	Focuses on DWP programmes including: New Deal (variants 25+, 50+. Disabled Persons, Partners), Pathways to Work, and Work-Based Learning for Adults (WBLA).
<b>G5</b>	DWP (2011) <i>Jobseekers' Allowance provision for the 50+</i> DWP Research Report No 766  Full and summary reports available	Reviews added support for 50+ JCP customers perceived to have age-related issues. Research carried out October-December 2010 in 7 JCP GB districts with qualitative interviews for 35 advisers and 60 customers. No sub-national analysis.	JCP customers aged 50+ believed to have age-related issues (though these were rather vague with the implicit assumption that all 50+ have issues).	50+ customers were offered three enhanced services: access to work trials from day one; extra time (30 mins) of adviser; and fast-track to Stage 3 of Jobseeker's Regime and Flexible New Deal (offering intensive support, etc.).

<b>G7</b>	DWP (2012) <i>How ready is JCP to help people in their 60s find work?</i> DWP In-House Research Report No 11	Produced in-house by DWP but drawing on a wide range of sources, it reviews the then (2011) JCP support available for 60+ customers. This is an overview and so there is no sub-national analysis.	This recognises that the number of 60+ jobseekers will grow and JCP needs to have the support services available to meet the demand. It recognises that the older jobseekers are not a homogeneous group, and this is also the case for the 60+ with different attachments to the labour market and different support needs. The review also indicated that 60 seems to be the age when many customers look to 'winding down' to retirement and this in many cases seems to be accepted rather than challenged by the current support available.	The review focuses on the 60+ cohort and on what JCP then (2011) proved. It came just before the introduction of a more flexible approach to support and so some of the issues raised by the review were covered by the revised approach.
<b>G12</b>	DWP (2014) <i>Work Programme Evaluation – Participants' Experience.</i> DWP Research Report 892	External research report on the Work Programme three years on, focusing on the participants' experiences. There is no sub-national analysis (even though experiences are likely to vary considerably given the different labour market conditions and (partly because of this) the WP cohorts.	The evaluation focuses on participants in the WP during its first 3 years and so covers the first intake completing two years on programme. The data shows that many participants generally had multiple issues to contend with, but it covered all age groups. After two years around two-thirds of participants returned to JCP and these were more likely to be men aged over 55 with health or disability issues and with low or no qualifications – essentially the hardest group to help.	The emphasis in the WP was on a customised approach to support delivered through external contractors on a payment-by-results basis (with the harder to help attracting the highest rates). Underlying it all was the work-first principle.

<p><b>G13</b></p>	<p>DWP (2015) - <i>A New Vision for Older Workers; Retain, Retrain, Recruit</i>. DWP</p> <p>Special report by Dr Ros Altmann CBE, Business Champion for Older Workers</p> <p><b>FICHE</b></p>	<p>A specially-commissioned report with a wide-ranging remit on older workers, and useful because it also covers recruitment issues of relevance to jobseekers. It is national in scope but offers useful policy options that might be adaptable locally.</p>	<p>The review mainly focuses on those in work and how extended working lives can bring benefits all round. It is set against the backdrop of the changing legislation on retirement (especially abolition of the retirement age) but on based on the reality of age discrimination and 'unconscious bias' prevails and needs to be addressed through a range of measures.</p>	<p>The report looks at the shortcomings of the current approach and how policy has not made much difference to how older workers are regarded (but importantly how they regard themselves).</p>
<p><b>G15</b></p>	<p>DWP (2017) <i>Sector-based work academies and work experience trials for older claimants</i>. DWP Research Report No 938</p> <p>Full and summary reports available</p> <p><b>FICHE</b></p>	<p>Reports on a trial of two programmes with older (45+) unemployed claimants – sector-based work academies (in Tyne &amp; Wear and Birmingham and Solihull) and work experience and training West Yorkshire and Black Country). Carried out between April 2015 and March 2016.</p>	<p>These two programmes have been available to younger claimants and so the test was to see if they could have similar effects to the older claimants. However, by including the 45+ group this might have had the effect of giving a false impression – there is no analysis by age-group within the broad over 45s which is a shortcoming in the research.</p>	<p>the aim was to see of they could benefit those aged 45+ focusing on:</p> <ul style="list-style-type: none"> <li>- Why older claimants and employers take part.</li> <li>- How employers viewed the programmes.</li> <li>- Whether provision was suitable for older claimants.</li> <li>- Impact of provision on claimants (though findings here were not a proper impact evaluation which was planned for a later stage).</li> </ul>

<p><b>G16</b></p>	<p>DWP (2017) <i>Employers experience of recruiting and retaining older workers</i></p> <p>DWP Research Report No 940</p> <p>Includes full and summary reports and a slide pack.</p>	<p>Looks at the attitudes and behaviours of employers in recruitment, retention and retraining of older workers. For jobseekers the findings on recruitment are the most instructive, otherwise the report is mainly dealing with those already in work.</p>	<p>The over-50s in work are the focus and the report find employers generally positive towards older workers they employ and have few (if any) targeted policies towards them (such as covering health, care duties, training, etc. Part of this reluctance is a fear that they might contravene age-related legislation. This is also the main reason for their claim that they have no age-related bias in their recruitment practices and do not even monitor their workforces by age (it is claimed).</p>	<p>The focus is on what individual employers do in practice through case studies, but it is likely that the interviews failed to get at some of the real issues with their older workforces.</p>
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## C2.2: Extended matrix – Selected Governmental evidence and contexts

No	Source	iv): Policy/evidence context	v): Evidence source and quality	vi): Transferability
G1	DWP/BIS (2010) <i>Second survey of employers' policies, practices and preferences relating to age, 2010</i> , Employment Relations Research Series No 110 (Metcalf H and Meadows P)	Since the introduction of age discrimination legislation in 2006, the study found that the explicit use of age in recruitment has declined significantly but there have been few changes (i.e. improvements) in the use of age and expected length of service as selection criteria. This was especially the case for the 60+ groups and very common for the 65+ group, with potential length of service being the main factor (and more so for skilled jobs than professional jobs. The use of disability and health issues as selection criteria had also grown (i.e. more employers were using them as recruitment filters).	The timing of the survey was in the early period of the Great Recession when recruitment activity was still recovering. This suppressed labour demand may have given employers many recruitment options making it easier to discriminate on age. In a tighter labour market there may be less evidence of this, though still undoubtedly prevalent.	There is no policy as such to transfer, but the likely incidence of indirect age discrimination in recruitment is something that needs to be considered when designing new policy.

<p><b>G2</b></p>	<p>DWP (2010) <i>50+ back to work evidence review and indicators guide for secondary analysis</i> DWP Research Report No 615 by Policy Studies Institute (PSI)</p> <p><b>FICHE</b></p>	<ul style="list-style-type: none"> <li>• Key findings for the 50+ cohort include: New Deal 25+ the mandatory intensive Activity Period saw a significant increase in employment levels among the 50+, sustained for two years with the effect stronger for the 50-55 group than older;</li> <li>- Across the different programmes advisory support given by an adviser close to the age of the client was considered 'an asset';</li> <li>- There were significant employment gains in the Work-Based Learning for Adults (WBLA) programme for 50+ in both shorter and longer periods of training;</li> <li>- In general programmes targeted at 50+ had lower take up than younger age cohorts;</li> <li>- Older clients from managerial and professional backgrounds are not well-served and need specialist attention.</li> </ul>	<p>Draws on available evidence over period 2000-2008 but could not assess 'what works' because none of the evaluations used comparison groups. Complications also arise because some programmes have multiple targets (e.g. different age groups).</p>	<p>Some of the broader issues include:</p> <ul style="list-style-type: none"> <li>- Support needs to recognise the diversity of the 50+ group;</li> <li>- For low qualified training or retraining is likely to be needed;</li> <li>- Addressing ageism in the workplace is essential, as is building up the confidence of older jobseekers;</li> <li>- Employers need to be convinced of the business case for employing an older worker.</li> </ul>
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<p><b>G5</b></p>	<p>DWP (2011) <i>Jobseekers' Allowance provision for the 50+ DWP</i> Research Report No 766</p> <p>Full and summary reports available</p>	<p>The findings were not very clear and partly conditioned by changes in the service provision during the short implementation period of the enhanced service. Some interesting points emerged:</p> <ul style="list-style-type: none"> <li>- Customers lost confidence quickly if they did not find work so timing of support was all-important;</li> <li>- Those customers with previous strong work experience (i.e. newly unemployed after long work history) were most difficult to help since their expectations acted as a barrier – they also felt the jobcentre was an alien environment;</li> <li>- Age 55 seemed to be the more important watershed for a customer, after which they often considered winding down and moving (gradually) into retirement.</li> <li>- Training given to some advisers on dealing with older customers was successful but was not extended to all those advisers dealing with older customers.</li> </ul>	<p>Essentially a qualitative review with small numbers of customers and JCP advisers involved. The initiative also seemed to be blighted early in its implementation by changes in some associated support options. It also appeared that few customers were fast-tracked to FND and so this could not be assessed properly.</p>	<p>The main lessons emerging here are:</p> <ul style="list-style-type: none"> <li>- Customers recently unemployed and with a long work history warrant special treatment and maybe even special facilities to avoid feelings of intimidation;</li> <li>- The desirability of bespoke services was evident (though not delivered by this initiative);</li> <li>- Adviser training on dealing with 50+ clients essential.</li> <li>- Distinction between the attitudes of those below and above 55 towards continuing in work.</li> </ul>
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<p><b>G7</b></p>	<p>DWP (2012) <i>How ready is JCP to help people in their 60s find work?</i> DWP In-House Research Report No 11</p>	<p>Some of the key findings underpinned that the 60+ jobseekers were not a homogeneous group and so would benefit from customised support. The main issues they faced included:</p> <ul style="list-style-type: none"> <li>- Lack of modern job search skills (many had been in work for a long time);</li> <li>- Limited IT skills which also curtailed their ability to use online job search and other resources;</li> <li>- Unrealistic wage expectations and the sorts of jobs they might get;</li> <li>- Sometimes outdated skills, qualifications and certification.</li> </ul>	<p>A range of qualitative sources were used to inform the report including: focus groups of JCP advisers; short online survey of JCP staff; small number of phone interviews with older jobseekers; and some employer phone interviews. To some extent the finding were superseded by the introduction of a more flexible regime for advisers to support jobseekers which accommodated some of the concerns raised by the report.</p>	<p>Some useful pointers on the type of support needs included:</p> <ul style="list-style-type: none"> <li>- Advisers need more tools to help address the particular issues of the 60+ cohort;</li> <li>- Often the older jobseekers need more wide-ranging advice (e.g. on pensions) that staff should be able to respond to (or refer them on);</li> <li>- Staff need more flexibility to customise their support to the individual customer.</li> </ul>
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<p><b>G12</b></p>	<p>DWP (2014) <i>Work Programme Evaluation – Participants’ Experience</i></p> <p>DWP Research Report 892</p>	<p>The views of participants varied though were felt to be good overall and findings included:</p> <ul style="list-style-type: none"> <li>•- Providers seen as delivering high level of ‘procedural’ personalisation (e.g. friendly atmosphere, standardise tools);</li> <li>- Providers less good at delivering ‘substantive’ personalisation (e.g. customised support tailored to the needs of the individual);</li> <li>- Motivation of participants was generally high at the start and so required levels of early engagement with advisers in providers.</li> </ul>	<p>The research involved a large-scale longitudinal survey of participants and qualitative fieldwork with participants, supplemented by other interviews. This was at the start of the WP and so some allowance should be made for a new (and comprehensive) programme settling in – experiences might be different later. Plus, like all programmes the prevailing economic and labour market conditions can influence outcomes.</p>	<p>The learning points include:</p> <ul style="list-style-type: none"> <li>- Older participants were likely to report multiple barriers to working;</li> <li>- Personal Action Plans seemed to be useful if planning and monitoring activity;</li> <li>- Most participants had high motivation at the start of the programme and this needs to be capitalised on as it quickly waned;</li> </ul>
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<p><b>G13</b></p>	<p>DWP (2015) - <i>A New Vision for Older Workers; Retain, Retrain, Recruit</i></p> <p>DWP – special report by Dr Ros Altman CBE, Business Champion for Older Workers</p> <p><b>FICHE</b></p>	<p>The findings are rather broad, calling for cross-government strategy (this was done at the time of the Coalition government so perhaps in more of an atmosphere that such cooperation might work). More specifically it sets out ideas under three main headings:</p> <ul style="list-style-type: none"> <li>- Retain – keeping older workers and their skills in the workplace;</li> <li>- Retrain – ongoing workplace training, apprenticeships for older workers, career reviews, etc.;</li> <li>- Recruit – stamp out age discrimination and unconscious bias with ideas for this mainly based on transparency and publicity on good practice.</li> </ul> <p>The recruit ideas are relevant to older jobseekers and while not particularly innovative, they do present a coherent package.</p>	<p>The report was based on secondary research and qualitative sources in a review led by a (relatively) high profile person (Ros Altman) in the field. As with these types of inquiry, they may have the endorsement of government (and in this case the then Coalition government), this is no guarantee that its findings will find their way into policy (as has largely proved to be the case).</p>	<p>While the report does not focus on a particular measure or policy, it does offer ideas on the kinds of ingredients that could contribute to a change of attitude and practice. Some of these ingredients could be incorporated into a more target policy such as:</p> <ul style="list-style-type: none"> <li>- Retraining opportunities such as apprenticeships, IT skills, adult learning support and mid-career IAG;</li> <li>- Improvements to JCP support through better data on what works and earlier interventions with enhanced one-to-one support.</li> <li>- Measures might include temporary NI relief for recruiting older workers and better support for self-employment for those for which this is a realistic option.</li> </ul>
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<p><b>G15</b></p>	<p>DWP (2017) <i>Sector-based work academies and work experience trials for older claimants</i></p> <p>DWP Research Report No 938</p> <p>Full and summary reports available</p> <p><b>FICHE</b></p>	<p>The reported results were generally quite positive from all aspects with evidence that:</p> <ul style="list-style-type: none"> <li>- Both programmes helped participants to overcome age-related and other barriers to work.</li> <li>- Both programmes were appropriate for older workers if they are well-organised, structured and offer genuine exposure to sector-relevant training and work experience.</li> </ul> <p>The research was not able to state for sure that participation helped claimants move closer to the labour market and find a job, but the indications are that they did.</p> <p>There was little analysis by age group but some suggestion that positive outcomes were mainly focused on the 45-55s in the sample.</p>	<p>Based on a qualitative research element – 60 participants and 19 host employers, and a quantitative element of 1,000 older claimants (45+) of which 125 were on the sector-based work academy option and 386 on the work experience option, plus 600 non-participants.</p> <p>Of the total sample, for the sector-based work academy trial 38% were 45-49 and for the work experience trial 32% with 32% of the non-participants. These high proportions could skew the overall results since it is a generous definition of older.</p>	<p>Various points emerge for transferability:</p> <ul style="list-style-type: none"> <li>- Employers need to have some recruitment needs and have confidence in JCP as a recruitment channel.</li> <li>- Participants in the sector-based work academies option did best when all three elements (i.e. pre-employment training (which was mandatory), work experience placement, and guaranteed interview).</li> <li>- The trials were in just four areas which may not be indicative of whether they would work in GMCA, though all areas were large urban areas likely to have similar characteristics.</li> <li>- The high proportion of 45-49 year olds in the sample may skew the results for older workers.</li> </ul>
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<p><b>G16</b></p>	<p>DWP (2017) <i>Employers experience of recruiting and retaining older workers</i></p> <p>DWP Research Report No 940</p> <p>Includes full and summary reports and a slide pack.</p>	<p>There was no evidence of targeted policies for older workers covering health, caring and training issues and no special provision for responding to requests for flexible working, etc. which was generally judged on a case-by-case basis. However, there were indications that some employers would have difficulty recruiting those with health, caring and other issues that might affect their work. Employers tended to state that older employees offered values such as loyalty and experience, but these were very difficult to demonstrate in interview.</p> <p>Employer recruitment strategies tended to advertise job vacancies using the usual online, newspaper and specialist journal routes, but local adverts (shop windows, outside the workplace, etc.) were popular. Few used social media. Some employers felt that older jobseekers were at a disadvantage in using online sources.</p>	<p>Based on 50 employer case studies carried out in 2017 across GB with half the total concentrated in lower paid sectors such as care homes, cleaning, fashion retail and transport.</p>	<p>Some finding around the recruitment practices of employers offers useful pointers:</p> <ul style="list-style-type: none"> <li>- Employers need to monitor the age of their workforce if they are to identify the benefits of a mixed-age employee base;</li> <li>- Flexible working could be important to older workers, but is should be available to all age groups;</li> <li>- Managers should be given training on age-related issues;</li> <li>- Managers and employees should be empowered to hold discussions about work and retirement plans.</li> <li>- Sectors such as care homes and cleaning were the most receptive to recruiting older workers.</li> </ul>
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## C3.1: Extended matrix – Selected professional evidence and contexts

No	Source	i): Location of intervention/ evidence etc.	ii): Target groups for intervention/ evidence	iii): Intervention/ evidence context
P1	EHRC (2010), <i>Working Better, the over-50s, the new work generation</i> . Equalities and Human Rights Commission, Manchester	All UK meta-analysis	Over 50s and in-work working practices and organisation.	Working Better was an initiative of the Commission looking at how to better match the aspirations and needs of workers, in ways that meet both the economic and individual challenges of modern Britain. This report updated an earlier analysis of the situation of over 50s.
P2	TUC (2011), <i>Valuing the skills of older workers; How to do a mid-life development review</i> . Trades Union Congress (TUC) and Unionlearn	UK	Initially aimed at mid and later age employees and practice guidance for union learning representatives; on publication was presented as an all age guide including for those facing redundancy.	An initiative to provide support for union-learning representatives at unionised workplaces for mid-life development reviews.
P5	NIACE (2012), <i>Older Peoples Learning</i> . National Institute of Adult Continuing Education (NIACE) Leicester.	GB wide	Over 50s in work, seeking work and not economically active	This is a follow up study to NIACEs 2005 survey adding an enhanced sample and additional questioning to an annual review targeted at older individuals.
P8, P11, P12	BIC (2015), <i>The Missing Millions: Recommendations for Action</i> .	GB wide analysis	Broad focus on 50+	Cross-agency initiative led by BIC including PRIME and ILC-UK aimed at reviewing enhanced employment potential for over 50s in the economy.



<b>P10</b>	CAB (2014), <i>Fulfilling work: What do older workers value about work and why</i> . Centre for Ageing Better, London.	UK wide assessment	Over 50s	Set against wider policy background of extending working lives and other reports (BIM, CIPD) looking at internal labour market and organisational management issues.
<b>P14 (and P9, 13)</b>	CIPD (2016), <i>Creating Longer, More Fulfilling Working Lives</i> . Policy Report, Chartered Institute of Personnel and Development. London.	UK wide analysis but including case studies from Czech Republic, Denmark, France, Germany.	Target groups are employers with a 50+ workforce – predominantly in the UK.	CIPD research programme centred on organisation scope for making the best of an ageing workforce and responding to the extended working lives challenges.
<b>P18</b>	Age UK, <i>Helping 50+ Jobseekers Back to Work: Lessons for the UK Work and Health Programme</i> . Age UK. London	UK wide analysis.	Target group is past 50+ jobseekers in the Work Programme and potential 50+ participants in the new Work and Health Programme.	Report focussed on lessons learned from less effective delivery for 50+ in Work Programme for the successor initiative in the Work and Health Programme.

## C3.2: Extended matrix – Selected professional evidence and context

No	Source	iv): Policy/evidence context	v): Evidence source and quality	vi): Transferability
P1	EHRC (2010), <i>Working Better, the over-50s, the new work generation</i> . Equalities and Human Rights Commission, Manchester.	Working Better was an ambitious EHRC initiative – focussed across multiple areas of inequality in employment opportunity; the focus here was on effective working practices for over 50s.	The report provide a demographic and economic activity analysis using a range of available data sources, supplemented by three employer organisational working practices case studies.	Its relevance is in the 'equalities' policy relationships. The evidence is now rather dated and a wider range of evidence on effective organisational practices can be found in later sources (BIM, CIPD).
P2	TUC (2011), <i>Valuing the skills of older workers; How to do a mid-life development review</i> . Trades Union Congress (TUC) and Unionlearn	The mid-life review aimed at a wider focus than 50+ but included a section geared to their specific needs.	This was a practice guide with illustrative content drawn on a range of union learn experience.	Its focus on providing a practical tool to support union learning reps has limited direct transferability. However, it may provide a starting point for more generic approaches in place-based 50+ support initiatives where there is a focus on older employees in work but facing redundancy or others considering a career change.

<p><b>P5</b></p>	<p>NIACE (2012), Older Peoples Learning. National Institute of Adult Continuing Education (NIACE) Leicester.</p>	<p>Research and not policy-centred.</p>	<p>This enhancement to the NIACE annual survey of adult learning aimed to contrast trends since 2005 (the previous enhancement survey) based on a survey of 4601 people over 50. Some of the questions are repeated, making it possible to examine changes over time. Others are new, reflecting new policy concerns.</p>	<p>Relevance is in this being probably the most up to date large-scale survey of training and learning behaviours and attitudes in the over 50s – although six years out of date now. It shows around one older person in five reports some form of learning in the last three years (unchanged since 2005, but significant shifts in what they are learning, where and why with uncertain impact of the rise in on-line learning. Employment status is more influential than age itself in determining learning activity. The study is a useful broad analysis but probably too generic in its learning focus to be of specific value to training content and modes for place-based actions to return to work for over 50s.</p>
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<p><b>P8, P11, P12</b></p>	<p>BIC (2015), <i>The Missing Millions: Reports 1 (2014) and 2 (2015) and Final Report: Recommendations for Action. Business in the Community</i>, London</p>	<p>Broadly based programme set against a policy background aimed at extending working lives (increases to the State Pension Age, removal of default retirement ages, and the Government's 'Fuller Working Lives' and 'Age Positive' initiatives). Its main focus was on the scope for business practices and also enabling actions by government to encourage business adjustments.</p>	<p>A three-staged research programme working mainly as a meta-analysis and with available data (mainly ELSA and LFS).</p>	<p>The study is mainly relevant for the concluding recommendations – its report 1 and 2 analyses provide a useful state of the art assessment but little new in observations of activity and rigidities. Hi level proposals are made for public policy but their may be some relevance for place-based actions in working with employers to increase employment potential and opportunities for older people through its recommendations for: age-unconscious recruitment, selection and training, agile working opportunities, tailored benefits, new models of career success, active line manager support, Mid Life Career Reviews and external opportunity partnerships. They also propose in-firm active support to help carers and people with disability to remain in work.</p>
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<p><b>P14 (and P9, 13)</b></p>	<p>CIPD (2016), <i>Creating Longer, More Fulfilling Working Lives</i>. Policy Report, Chartered Institute of Personnel and Development. London.</p> <p><b>FICHE</b></p>	<p>Professional policy perspective on potential HR challenges and responses to long standing demographic-skills supply challenges and organisational potential for responses to the extended working lives policy agenda.</p>	<p>Three-phase, differently sourced study – with the first drawing on an industry survey of age-sensitive working practices and the second a current (2015) profession-based analysis of these practices set against wider labour and skills supply challenges, productivity pressures and rising customer service expectations. This third report draws together a CIPD perspective on the need for better practices notably at organisation level.</p>	<p>The CIPD research is relevant in that it goes beyond a meta-analysis to provide empirical evidence of current workplace practices (and rigidities) and innovation from the UK and four other European countries. Its relevance to place based actions may be more limited since its focus is on organisational age sensitive practices relating to older workers in employment. However, its eight specific proposals for enhanced employer practice have an evidence underpinning, have the credibility of originations in the UKs HR professional body and may help build employer capacities to provide sustainable opportunities for over 50s.</p>
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<p><b>P18</b></p>	<p>P18 (Included) Age UK, <i>Helping 50+ Jobseekers Back to Work: Lessons for the UK Work and Health Programme</i>. Age UK. London</p>	<p>Evidence-based review of lessons learned from less effective job outcomes for over 50s from previous Work Programme and specific implications for roll-out of Work and Health Programme for over 50 participants.</p>	<p>Drawing on past analyses and in particular the Age UK-CESI report (see P6) but with an updated analysis of implications for the new programme in more effective job outcomes for 50+.</p>	<p>Offers evidence-based insights for 50+ in the (all age) Work and Health Programme's including for:</p> <ul style="list-style-type: none"> <li>- Revised payment structure and claimant journey for 50+ jobseekers</li> <li>- Earlier intervention and shorter (6 months) referral time for JSA claimants aged 55+</li> <li>- Incentives geared to avoid provider 'parking' over 50s and extra payment for providers placing 50+ in sustainable employment regardless of benefit background</li> <li>- Mechanisms for DWP and welfare-to-work providers sharing good practice relating to older jobseekers</li> <li>- A 'job brokerage' system (e.g. recruitment agency model).</li> </ul> <p>The report recognises this would be costly and suggests a possible focus of enhanced 50+ actions on most disadvantaged claimants. It also calls for improving joined-up planning between employment support and re- and up-skilling opportunities for older jobseekers and access to 50+ specialist provision.</p>
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## C4.1: Extended matrix 1 – Selected international evidence and contexts

No	Source	i): Location of intervention/ evidence etc.	ii): Target groups for intervention/ evidence	iii): Intervention/ evidence context
INT1	<p>European PES Network good practice examples drawn from 32 PES in the EU.</p> <p>European PES Network website</p>	<p>BULGARIA – ‘Support for Retirement Scheme’. This was introduced in 2005 nationally and is ongoing. It recognises the adverse demographic effects of an ageing population on the labour force and aims to support older unemployed jobseekers who lack a certain length of service to qualify for retirement and state pension.</p>	<p>The target group is unemployed jobseekers aged 50+ who have a maximum of 5 years missing length of service that would qualify them for retirement and pension later. The evidence shows that this group can be incentivised back into work with the prospect of funded retirement when they reach the eligible age.</p> <p>All employers are eligible to apply for workers under the subsidy.</p>	<p>Employers are paid a subsidy (which can cover wages, paid leave, compulsory social security, compulsory unemployment fund contributions, etc.) for each unemployed person employed proportional to the length of employment offered (the longer the period the higher the subsidy). The employment period ranges between 3-24 months.</p> <p>The programme is run jointly by the Ministry of Labour and Social Policy, National Employment Agency, local employment offices and the National Social Security Institute. Funding is from the national budget.</p>



<p><b>INT3</b></p>	<p>Werner Eichhorst 7 Regina Konle Seidl (2016) <i>Evaluating Labour Market Policy</i></p> <p>Institute for the Study of Labor, IZA DP No 9966</p>	<p>This is wide-ranging meta study across ALMP evaluations across the world, though focused mainly on Europe and the United States.</p>	<p>Covers all groups and not much detail on individual groups (including older jobseekers).</p> <p>Concludes that what works in active measures depends on the profile of jobseekers and the type of outcome measured – whether short-term employment or longer-term sustainable jobs. Problem is that the latter presents particular problems of analysis and so is not much covered by evaluations.</p>	<p>Broadly human capital-style training for particular job or skills, plus to a lesser extent private sector job subsidies can deliver short-term job gains, but also have the best prospects for longer-term employment.</p>
<p><b>Fiche INT6</b></p>	<p>Peer Review (2012) <i>The role of public employment services in extending working lives</i></p> <p>European Commission (available on EU portal)</p> <p><b>FICHE:</b> Germany - Employment Pacts for Older Workers in the Regions.</p>	<p>A Peer Review held in 2012 under the EU Mutual Learning Programme to consider the role of PES in older working lives, with the focus on how to bring the unemployed (and disillusioned) back into the LM.</p> <p>The peer review was held in NL with 10 other member states participating</p>	<p>The focus was on 55+ group seen as the most critical in terms of assistance. The review of policies was focused on improving the employability of older workers and working with employers to change attitudes and perceptions. Progress had been made in many countries (though not all at the same pace) in rolling back pathways to early retirement and increasing retirement and pension ages.</p>	<p>Information on the different national approaches was condensed into the following key features of practice:</p> <ul style="list-style-type: none"> <li>- PES counsellors to have specific expertise for older clients.</li> <li>- Individualised pathways offering in-depth assistance.</li> <li>- Enhance existing skills of jobseekers through in-work and external training.</li> <li>- Recognise prior learning of clients and build on this with new qualifications, etc.</li> <li>- Address negative attitudes of employers.</li> </ul>

<p><b>INT7</b></p>	<p>European Employment Observatory (EEO) (2012) <i>Employment policies to promote active ageing</i></p> <p>European Commission DG EMPL (summary report not published)</p> <p><b>FICHE:</b> France – Older workers action plans</p>	<p>Summarises approaches and policies in 33 countries (EU28 + Iceland, Norway, Serbia, Turkey and Former Yugoslav Republic of Macedonia) based on papers prepared by EEO experts in each country. While the focus is on active ageing, there are more directly relevant sections on: unemployment benefit systems, employment services, employment-friendly tax-benefit systems.</p>	<p>The focus is mostly on 50+ but in some cases policies are targeted at 45+, especially where pension provision is still available at comparatively low ages (though all countries are addressing this – some more successfully than others).</p>	<p>Given the variety of contexts among the 33 countries, this often dictates the type and ways in which measures are developed and introduced.</p>
<p><b>INT8</b></p>	<p>Eurofound (2013) <i>Role of governments and social partners in keeping older workers in the labour market</i></p> <p>Eurofound Research Report</p>	<p>The review covers EU27 plus Norway and looks at how countries have tackled retaining older workers in the LM, including those out of work. It is based on the contributions from country experts in the Eurofound IR network.</p>	<p>Most of the narrative is focused on the 50+ cohort, though some policies look at 45+.</p>	<p>The relevant section on ALMPs aimed at older unemployed shows that certain types of targeted policy vary as follows (number of countries with policy in parentheses);</p> <ul style="list-style-type: none"> <li>- Wage subsidies, public works or job guarantee (16).</li> <li>- Subsidies to employees or self-employed (5).</li> <li>- In-work training (6).</li> <li>- Training for the unemployed (12).</li> </ul> <p>Not many countries offer all four.</p>

<p><b>INT10</b></p>	<p>OECD (2011-2018) <i>Country case studies on age and employment</i></p> <p>OECD publishing (on-line)</p> <p>Case studies currently available for: Korea, Japan, United States, Denmark, Poland, Switzerland, Netherlands, France and Norway.</p>	<p>A series of country reports on working better with age and fighting age inequality. Each report covers an assessment of where change and new approaches are needed to improve work incentives and employment opportunities for older age groups.</p> <p>The report on Korea was selected for more detailed appraisal bring one of the latest to be published (2018).</p>	<p>The most vulnerable older workers are those aged 55 and over who are forced into taking early retirement from their main job but must seek alternative employment to avoid poverty. This acts as a powerful incentive for them to take any job and employers have responded by creating lots of short-term, low-paid and low-quality jobs. The high employment rate means that the jobs issue extends into their 70s for many workers.</p>	<p>Korea faces the fastest-ageing economy among the OECD countries yet has one of the lowest unemployment rates (under 3%) and few long-term unemployed and highest employment rates, particularly among older workers (for example, 33% of those aged 70-74 are still working).</p>
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## 4.2: Extended matrix 2 – Selected international policy/evidence review

No	Source	iv): Policy/evidence context	v): Evidence source and quality	vi): Transferability
INT1	<p>European PES Network good practice examples drawn from 32 PES in the EU.</p> <p>European PES Network website</p>	<p>The measure is in response to the need to increase labour supply by bringing older jobseekers back into work with the incentive of compensating for lost years of service towards their state pension.</p> <p>Those unemployed with tertiary education, higher qualifications and relevant experience can be employed as consultants to assist employers in subsequent implementation of the practice.</p>	<p>The measure was subject to a quasi-experimental evaluation alongside all other active measures in 2006 and emerged as one of the most effective measures for increasing the chances of finding a job (40% better chance).</p>	<p>The fact that this measure has been in place since 2005 suggests that it works – but the context of Bulgaria is different. In terms of pension arrangements. Key characteristics include:</p> <ul style="list-style-type: none"> <li>- Relatively low state pension (retirement) age.</li> <li>- Strong cooperation between national agencies in sustaining policy (especially finding) and local agencies for implementation.</li> <li>- Critical labour supply situation caused by demographic change and high economic emigration.</li> </ul>

<p><b>INT3</b></p>	<p>Werner Eichhorst 7 Regina Konle Seidl (2016) <i>Evaluating Labour Market Policy</i></p> <p>Institute for the Study of Labor, IZA DP No 9966</p>	<p>The debate on the value of fixed-term (temporary) jobs from ALMPs is unclear though in some countries less so. In Italy temporary jobs can improve the chances of finding a permanent job, although these may be extended periods of successive temp work before a permanent job is found. In Germany temp jobs are useful for screening applicants and valued by employers with no perceive negative effects on a transition to a permanent job.</p> <p>Overall conclusion is that the short-run effects of ALMPs are rather low and can only contribute a little to reducing structural unemployment.</p>	<p>The evidence for the many evaluations referred to in this report are varied, though there is an increasing number of experimental studies in Europe, whereas they have been common in the USA for some time. Quasi-experimental studies are more common, though isolating effective control groups remains a challenge.</p> <p>Periods of non-employment before taking up a fixed-term contract, low skills, elementary occupations, age and working in a small business or public sector tend to be negatively correlated with transitions to permanent jobs.</p>	<p>This is a broad study with not much detail on sub-groups. The following points are potentially useful:</p> <ul style="list-style-type: none"> <li>- Fixed-term employment should be a legitimate goal for measures and is an effective screening mechanism.</li> <li>- Training for work or qualifications relevant to LM needs offers a good prospect for longer term work.</li> <li>- Older participants taking up fixed-term jobs may have less prospect of moving to a permanent post than younger ones.</li> </ul>
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<p><b>INT6</b></p>	<p>Peer Review (2012) <i>The role of public employment services in extending working lives</i></p> <p>European Commission (available on EU portal)</p> <p><b>FICHE:</b> Germany - Employment Pacts for Older Workers in the Regions</p>	<p>The detail of the various national approaches is in the country papers. Overall points emerging included:</p> <ul style="list-style-type: none"> <li>- The best context for increasing participation rates of older workers was an overall high LF PR, availability of part-time jobs, and low overall unemployment (e.g. Nordic countries, NL).</li> <li>- Older jobseekers may have out-of-date views on jobs available and how to access them.</li> <li>- Older jobseekers tend to have better prospects in SMEs.</li> <li>- The portfolio career option is viable, even combining part-time employment with self-employment.</li> </ul>	<p>The evidence base for the various findings is quite convincing and much of it from studies in countries such as DE, NL and SE. Some policies have been monitored closely.</p>	<p>A range of issues for PES to consider included:</p> <ul style="list-style-type: none"> <li>- Staff development to offer targeted services.</li> <li>- Foster individual responsibility for employability but facilitate it through appropriate measures.</li> <li>- Work with other stakeholders in casework for activation of older jobseekers.</li> <li>- Provide structured opportunities for personal and skills development.</li> <li>- Support employers (especially SMEs) with information and advice on age diversity and management.</li> <li>- Involvement in strategic partnerships at national, regional and local levels to change attitudes and perceptions.</li> </ul> <p>There was also a suggestion that 'senior workers/ jobseekers' should be adopted in preference to the 'older' prefix.</p>
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<p><b>INT7</b></p>	<p>European Employment Observatory (EEO) (2012) <i>Employment policies to promote active ageing</i></p> <p>European Commission DG EMPL (summary report not published)</p> <p><b>FICHE:</b> France – Older workers action plans</p>	<p>Access to UB – stricter rules have been introduced in some countries (e.g. BE, DE, HU, PT) on access to benefits. In BE the principle of ‘availability for work’ was increased to 60 and 65 in areas of low unemployment. Combined with other measures (e.g. restricting early access to pension) the labour market exit age has risen in many countries.</p> <p>Employment services – the provision of wage subsidies to encourage employers to take on older workers are still common, Staff trained in dealing with older clients and in some cases specialist centres for older workers to receive support (e.g. BE – Flanders has 25 centres of the over 50s). Public jobs creation is also prevalent in some countries (e.g. PT, SI).</p> <p>There has been a growth in tax-benefit systems to incentives jobseekers to take a job including exemptions from national insurance, higher tax credits of personal allowances, etc.</p>	<p>Many of the measures described have not been systematically evaluated though in some countries there are signs of a more robust approach. In DE for example an analysis of wage subsidies for recruiting unemployed people showed good results, though was not differentiated by age group but to avoid negative effects the period of the subsidy (not too long) and an obligation for employers to offer a job to the participant afterwards were critical factors in their success.</p>	<p>Some clear general messages emerge from the analysis which have implications across the different country contexts:</p> <p>Some clear general messages emerge from the analysis which have implications across the different country contexts:</p> <ul style="list-style-type: none"> <li>- Measures aimed at retaining/ making jobseekers employable are effective (training/ retraining, etc.).</li> <li>- Employers remain crucial to convince of the value of older workers and recruits and include workforce planning, recruitment methods, promotion and exit policies, training, flexible working, workplace adaptation, etc.</li> <li>- Policy aimed at engaging older workers in the labour market requires the involvement of all key stakeholders (including social partners, PES, regional and local authorities, adult learning providers and civil society actors).</li> </ul>
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<p><b>INT9</b></p>	<p>Eurofound (2013) <i>Role of governments and social partners in keeping older workers in the labour market</i></p> <p>Eurofound Research Report</p>	<p>Many countries have used a combination of approaches to improve participation including:</p> <ul style="list-style-type: none"> <li>- UB reforms – most disincentives to work such as extra duration of benefits, not being required to register after certain age, not required to actively seek work) have been removed.</li> <li>- National strategies for removing age discrimination in employment and getting the correct message across to employers that older workers do not generally have worse health issues, more time off or lower productivity than younger workers.</li> </ul>	<p>The report found the extent of evaluation of the various policies disappointing. Wage subsidies have been examined more and in general targeted subsidies appear to be more successful than others.</p>	<p>The report makes some general points about the need to involve key players (including social partners) in policy development but the more interesting possibilities for transferability lie in the specific policies of a few countries including:</p> <ul style="list-style-type: none"> <li>- Austria – the ‘Combination Wage’ which subsidises the unemployed to take a low-paid job – around 75% of participants stayed in work and the ‘Come Back’ programme which gives a subsidy to employers to take on a hard to place unemployed person.</li> <li>- Germany – ‘Perspektive 50+’ involves widespread collaboration of local players at a regional level in assisting older unemployed offering training, internships, job subsidies, etc.</li> </ul>
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<p><b>INT10</b></p>	<p>OECD (2011-2018) <i>Country case studies on age and employment</i></p> <p>OECD publishing (on-line)</p> <p>Case studies currently available for: Korea, Japan, United States, Denmark, Poland, Switzerland, Netherminds, France and Norway.</p>	<ul style="list-style-type: none"> <li>- Local employment services – PES operate at national and local levels (municipality level) in collaboration with other providers in the public, private and vol/com sectors.</li> <li>- Job Hope Centres – aimed at those (mostly vulnerable) unemployed (and pre-retirement) aged 40 &amp; over offer a range of customised re-employment services.</li> <li>- Employment Success Package Programme – open to all unemployed jobseekers but includes a high proportion of 50+ and offers: intensive counselling; targeted training and business start-up advice; job placement support; and financial incentives to participate and stay in work.</li> </ul>	<p>The current main use of ALMP expenditure has been shown to have low employment outcomes. But short-term retraining offers better results for sustainable transitions into the LM – provided that the training is based on LM needs.</p> <p>Evaluation of the Employment Success Package Programme in 2014 showed that for participants aged 50+ the employment rate was consistently above that for non-participants and at three years in employment around 60% were still in work (42% for non-participants).</p>	<p>The labour market and institutional setup in Korea is quite unique in many ways, particularly the comparatively high employment rate for older workers, albeit many n lower quality and lower paid jobs than they were used to before early retirement. However, there are several features to their approach in helping older jobseekers that are useful to consider.</p>
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# Section D: Evidence fiches

**Preface:** The 11 evidence fiches summarised here are of sources from the extended matrices selected as being of particular relevance to the RER as either sources of relevant evidence and/or illustrations of 50+ return to work or related programmes from the UK and internationally. Each fiche provides the extended matrix reference (eg A.18) and is preceded by a summary of key learning points relevant to the RER. This is followed by a comparative summary in seven sections for: Intervention title and evidence source; policy or intervention context; monitoring, evaluation and available evidence; stakeholders and partners involved; targets groups and targeting; intervention effectiveness and success factors and transferability.

## Fiche Number 1: A.18

### Key Learning Points

- One of the few studies with an empirical focus (albeit small-scale) centred on older age self-employment and entrepreneurship
- Suggests that rationales for later life self-employment and (traditional) explanations of the declining likelihood of first-time entrepreneurship and self-employment as an economic activity after 45 years are misplaced when they consider this as a future orientated judgment by individuals
- Sets out a pluralised model for entrepreneurship and self-employment for those 50+ which includes different 'present' focussed motivations for (variously) accidental, reluctant and privileged first-time entrepreneur's orientations.
- Defines an important, although probably not numerically large, group called 'privileged' entrepreneurs who change from 'successful' employment to self-employment to fulfil personal goals which are largely not based in financial rewards.
- Successful later life adopters of self-employment from whatever motivation need local support policies and targeting which recognise these different needs and motivations and which offer more personalised support sensitive to the different motivations and circumstances.

### **1. Intervention title and evidence source:**

Parry S and Mallett O (2014) *Motivation for later-life entrepreneurship*. Newcastle University Business School: Discussion Paper.

Also

Mallet O and Wapshott R (2015), 'Entrepreneurship in a Context of Pending Retirement: The Lived Experience of Older Entrepreneurs' pp.67-89 in Sappleton N and Lourenco F (Eds) *Entrepreneurship, Self-employment and Retirement*. Palgrave Macmillan. London.

### **2. Policy or intervention in context:**

The policy context was assessing self-employment orientation as a later life work transition. This is set against a limited current literature or research base in the UK on entry to entrepreneurship and self-employment for individuals in late mid-career or later career. The research drew on (limited) empirical evidence to test previous assumptions about motivations and success factors, and may have relevance for 50+ support interventions where self-employment is a viable pathway for return to work and extending working lives.

### **3. Monitoring, evaluation and available evidence:**

The publication(s) is based on a meta-analysis to set out past evidence-based (and theoretical) assumptions of later life entrepreneurship – much of it drawn internationally and especially from North America. This is supplemented with small-scale empirical evidence including process tracing case studies to critical review past assumptions and look at self-employment motivations for older people. It takes a comparative focus by contrasting the lived experiences of those over 45 with younger and mid-age individuals.

### **4. Stakeholders and partners involved:**

The study was a collaboration between academics at the University of Newcastle; no other partners were involved. It has later contributed to international publications looking at pre and post-retirement entrepreneurship.

## **5. Targets groups and targeting:**

Although using a comparative meta-analysis, its focus has been on older age self-employment and entrepreneurship seeking to explain why the peak age for entrepreneurship and self-employment is 35 to 45 years, falling after 50 and particularly after 60. The explanation from past researchers in the USA and Canada, Netherlands and others has been that this adverse age effect reflects the opportunity cost of time: as an individual gets older, they become less willing to invest energy and resources in activities such as starting self-employment or first time entrepreneurship, which involve both risk and deferred financial returns.

## **6. Intervention effectiveness:**

Although not assessing a specific initiative or intervention to support self-employment in later life, the study suggests traditional explanations of first time later life entrepreneurship being constrained by greater 'opportunity cost' and financial risk may misrepresent actual motivations. It shows:

- Current explanations (and support models) fail to account for diversity of individual work-life contexts, and a lack of homogeneity in motivations for self-employment.
- Individuals in later life may enter self-employment reluctantly as accidental entrepreneurs or reluctant entrepreneurs, typically following life dislocation, after redundancy or other unwanted employment changes.
- Accidental or reluctant entrepreneurs are often last choice options with individuals acting as a response to age-discrimination or otherwise from a perceived or actual lack of alternative options for immediate financial rewards.
- Others of 50+ choosing self-employment or first entrepreneurship may be 'privileged entrepreneurs', where personal circumstances motivate and enable them to consider self-employment as a form of work that they find more fulfilling.

Privileged entrepreneurs often make these choices following a (relatively) successful career and which opens opportunities for older individuals to shift their motivations from financially focused deficiency needs to 'personal' growth needs such as fulfilment and self-actualisation. Individuals unable to satisfy these growth needs through employed work may choose to use their (more) financially privileged position, networks and gained experience.

The analysis and categorisation of different forms of later life self-employment challenges explanations built upon the presumption of later life self-employment motivation which is future oriented. This analysis suggests that accidental, reluctant and privileged entrepreneur's are all orientated to the present, and are seeking rewards that are more immediate.

## **7. Success factors and transferability:**

The analysis, although built on shallow empirical foundations, provide a new way of looking at self-employment and individual motivations in later life. The authors suggest this raises the need for:

- A more layered understanding and personalised approach to support for self-employment in 50+ individuals
- More finely tuned local policies and personalised support mechanisms
- Targeted initiatives or actions within wider programmes aimed at extending working lives which recognise the heterogeneous range of motivations, needs and goals of older people considering moving into self-employment.

## Fiche Number 2: A.23

### Key Learning Points

- Mid-life career and learning reviews (Reviews) can provide a crucial input to making better informed decisions in later life about employment and career options to support extended working lives
- A large scale trial in different settings for unemployed people, returners to work and those considering later life working needs in existing employment showed transformative outcomes for not only clients but also providers and employers
- There is no single model for delivery but the trials provide valuable and evidence pointers to a layered and mixed mode Review process which can be low cost and effective
- A series of practice-based success factors were also proposed for setting up a stand-alone review process or one embedded in a wider 50+ employment support initiative.

### 1. Intervention title and evidence source:

Watts J and McNair S, et al ((2015), *Mid-life career review: Pilot project outcomes. – Phases 1, 2 and 3 (2013-2015)*. Final Report to Department for business Innovation and Skills. National Institute of Adult Continuing Education (NIACE) Leicester.

Also available from Learning and Work (successor to NIACE) as:

[https://learningandwork.org.uk/sites/niace\\_en/files/resources/MLCR%20Final%20Report.pdf](https://learningandwork.org.uk/sites/niace_en/files/resources/MLCR%20Final%20Report.pdf)

### 2. Policy or intervention in context:

Between January 2013 and March 2015, the Department for Business, Innovation and Skills (BIS) funded the National Institute for Adult Continuing Education (NIACE) to undertake a pilot project in England to provide a mid-life, employment, training and career orientated, information advice and guidance (IAG) service. The Mid Life Career Review (MLCR) project aimed to explore the demand for a career review among employed and unemployed adults aged 45-65, its early value, and investigate the costs and benefits of such a service. The initiative involved face-to-face IAG (individually and in groups), over the phone, and online and involved 2,883 individuals. It was developed and run over three phases; this report draws together evaluation findings across each.



### **3. Monitoring, evaluation and available evidence:**

One of the few recent UK studies focussed on older age active measures centred on IAG (career) interventions. Research evidence looked across the constituent projects in the pilot and included broadly based survey and interview evidence for participants, stakeholders and providers. Impacts were assessed on a before-and-after model for clients, advisors, providers to the programme pilots, employers and for partners.

### **4. Stakeholders and partners involved:**

The pilot included 17 (different) pilots and aimed to fill a substantial gap in existing provision and seeking to support to individuals in building more sustainable working life decisions and practice in older age. Key delivery partners were the Government's National Careers Service Prime Contractors, voluntary organisations, selected learning providers, Unionlearn, Workplace Learning Advocates (WLA) and Community Learning Champions (CLC).

### **5. Targets groups and targeting:**

All England – although specific pilots often had a more specific geographic, sectoral or occupational focus. The pilots all targeted 45-65 year olds both in work and seeking employment.

## 6. Intervention effectiveness:

The evaluation showed substantial achievements against targets (and over-achievements in some areas which was taken to reflect considerable un-tapped demand). Evidence also showed:

- Significant attitudinal and behavioural client gains with positive outcomes for earlier return to work (after unemployment), into self-employment, negotiating more flexible working conditions, and finding appropriate training to improve their employability.
- Other participant impacts went beyond enhancing employment choices and included higher confidence; greater awareness of options for late life employment, and better work-life balance;
- Providers reported greater capacity, enhanced IAG skills sets for advisors, confidence in supporting adults in IAG, and widening employment/development pathways for clients
- Employers also reported impacts on improved retraining, retaining and better motivating their staff
- There were also gains for new and closer existing delivery partnerships in local communities.

Longer term benefits (proposed but not measured) were thought likely to extended working lives, alleviation of poverty in later life, improved work-life balance and helping to regenerate the economy in areas that need it most. Marketing proved a challenge and most recruited or referred clients were surprised to find that such a service was available. The project was explicitly welcomed by the Government's policy paper Fuller Working Lives: a Framework for Action<sup>2</sup> which aimed to extend working life and improve retirement decision making.

The pilots tested a range of models for delivering MLCR reviews; no single approach was seen to be appropriate for all circumstances or client groups but a majority of clients were better supported by a combination of:

- A well-facilitated group session (or sessions) with peers
- A following face to face and one to one session(s) with a trained adviser with sufficient time to enable the client to explore any topics which they wish to raise, or which are prompted by a well-conducted review.
- Access to follow-up support including on-line access.

## 7. Success factors and transferability:

Mid-life Career Review was thought to be a widely transferable model as a stand-alone initiative or (more probably) as part of a wider package of response to helping 50+ return to work and extend working lives. Effective provision of stand-alone or embedded Reviews was said to need:

- A focus wider than employment and career pathways – taking a personalised and whole-life approach on employment options, learning needs, life circumstances and aspirations.
- Advisor facilitation of understanding life expectancy, and implications for work, leisure, finance and health
- Support to individuals to review and assess (realistic) aspirations for work and life and how these might change over coming decades
- Facilitation for critically reviewing and realistically assessing options for job change and self-employment
- Helping individuals in making better informed decisions about retirement timing and phasing while taking account of (positive) health implications of extended working lives
- Finding and undertake training which can sustain them longer in rewarding activity, including paid employment
- Developing client strategies for overcoming workplace constraints including age discrimination and finding support from employers/other agencies to manage physical/mental stress at work
- Reviewing clients long term financial situation and finding appropriate financial and retirement planning support while also understanding rights (retirement timing, flexible working, caring)
- Developing client skills and knowledge to negotiate the outcomes which they would prefer.

There was no one 'best' models for delivering a Review to provide for these needs in all circumstances or client groups but MLCRs were most effective when:

- Delivering accessible advice at the right place and right time
- Effectively branded and promoted to reach a 'non aware' and diverse client group
- Involving a combination of a well-facilitated group session (or sessions) with peers, followed by face to face, one to one session/s with a trained adviser
- Providing sufficient time to enable the client to explore any topics which they wish to raise, or which are prompted by a well-conducted review.

The nature of the pilot made it impossible to provide precise costings for a Review, however, the experience of the providers suggests that it is possible to provide Reviews (including a mix of group and individual work, and allowing for repeat sessions for those who need it) for substantially less than £100 per client. In so far as a Review enables individuals to return to work, to find more productive work, and to extend their working lives in ways which maintain their health and wellbeing, this was suggested to be a very good return on investment.

## Fiche Number 3: A.35

### Key Learning Points

- Public policy aims to extend working lives place the emphasis on individual employers to adapt recruitment and retention and adjust their working practices to facilitate the changes
- While (some) employers are adjusting to specific issues such as the abolition of the default retirement; few are far sighted in working through wider implications of an ageing workforce
- Employer perceptions of the age discrimination legislation is having unintended adverse consequences which are not helpful to either employers or (older) employees
- The adjustment gap (by employers) needs to be addressed and is a necessary focus for a sustainable place-based 50+ employment support initiative.

### 1. Intervention title and evidence source:

Vickerstaff S et al (2017), *Exploring Retirement Transitions*. Research report from the ILC-UK and the Uncertain Futures research consortium.

### 2. Policy or intervention in context:

A research report set against the background of the Cridland Review (2017), SPA changes, pressures on public finances and government's policy encouragement to extend working lives. It looks at actions needed to address the challenge of fairness - what if individuals cannot work until they reach SPA; an issue likely to exacerbate if SPA raises further and when around 1 million older people have already involuntarily exited from the workforce before they reach pensionable age. Its focus is on changing expectations, addressing barriers and enhancing employment practices around retirement transitions and implications for personal support.

### 3. Monitoring, evaluation and available evidence:

This was a broadly based research review combining evidence from published sources and multiple data sets including ELSA/HRS data from the UK and with supporting comparative analysis from the USA. It also included other secondary sources from the "Uncertain Futures" consortium.

**4. Stakeholders and partners involved:**

The “Uncertain Futures” consortium included the International Longevity Centre–UK (ILC-UK), Institute of Occupational Medicine and academic experts from eight UK universities.

**5. Targets groups and targeting:**

The evidence is drawn from an all-age life-cycle approach but with a focus on outcomes for older people and especially those approaching SPA.

## 6. Intervention effectiveness:

The research acknowledges that addressing public policy aims to extend working lives needs adjustment by individuals and by the organisation they are or might be working for. Effective access to various forms of (retirement) 'bridging' and/or flexible working is seen as central to this but the research evidence suggests access to, or viability of, flexible working opportunities may be exaggerated for many 50+ workers and specifically:

- Where bridge employment options occur at workplaces these in the UK (and USA) they appear to be largely limited to some (higher) occupational groups.
- Relatively few older people work 'late' after SPA by moving into part-time work or self-employment).
- Legacy issues around (adverse) psychological health and constrained access to flexible working options may result in involuntary and early work exits from employment.
- Homemakers – predominantly women, and late carers, may be particularly vulnerable in older age returning to work and need particular support if they are to integrate back into the labour force.

The analysis suggests rigidities in employers responses to building potential for extending working lives. UK policy places responsibility for recruiting and retaining older workers on employers and adapted working practices yet the evidence suggests that while (some) employers were adjusting to specific issues such as the abolition of the default retirement age, few are sufficiently far sighted in working through implications of an ageing workforce, and in particular:

- Organisational responses to age discrimination legislation are commonly seemed to be having unintended consequences including health and wellbeing activities and carer forums not being targeted towards older workers (from fear this would be discriminatory).
- Employers were aware of age discrimination legislation the implications were being interpreted reactively and defensively, gain with perverse consequences such as line managers reluctant to talk about individuals retirement plans for fear of being accused of ageism.
- There was considerable employee interest in the idea of phased retirement but few had investigated whether if and how this was possible in their workplaces.

Overall, the evidence suggested organisational responses were constrained and falling some way short of the necessary positive and adaptive working environments needed to support public policy goals. The evidence also raises the potential for a much wider 'return to work' pathway for older people through 'un-retirement' which may be a consequence of current policy measures and other influences.

## **7. Success factors and transferability:**

The evidence has considerable relevance for place-based actions to support 50+ return to work in implying the need for employment support actions aimed at individuals needing to be matched with action to help employers build better adapted recruitment and working practices including, but not limited to, to appropriate flexible work. Critical implications for policy and practice are proposed as:

- Promoting more varied pathways into retirement, including gradual retirement or un-retirement, needing to recognise the implications of deep gender differences in work needs, opportunities and experiences.
- Adapting working practices to support extending working lives needs also to recognise the current limited availability of feasible flexible work options for many older workers or those seeking to return to work.

The evidence from the consortiums evidence is that place based actions which cannot work with employers and other to build this workplace potential are set to find challenges in securing job-outcomes for 50+ returners to work. They may find their actions are unsustainable if the placements and opportunities provided are not sufficiently durable against these needs and adaptation issues.



## Fiche Number 4: A.44

### Key Learning Points

A robust analysis using large-scale administrative data looking at age (and other) influences on return to work outcomes from the Work Programme (in Scotland) for JSA and ESA clients showing:

- JSA clients (62%) were much more likely to return to work (RTW) than those classified with chronic illness or health conditions - ESA clients (20%), and with a strong negative relationship between age and the predicted probability of having a job start for both JSA and ESA
- JSA clients were most likely to RTW early, especially for young clients although the age contrast show little difference for younger and 50+ after 9 months
- Age plays an important role in influencing RTW in both groups; however it also showed strong influences of other (potentially modifiable) factors including the length of unemployment, and the management of multi-morbidity challenges in clients
- Individual's expectation of the likelihood of job start was also a strong influence on RTW and where pre-conceived barriers could act as a substantial negative influence for older clients
- The study suggests the importance in any age specific support programmes of providing integrated interventions focusing on both health and "biopsychosocial" factors to enable RTW.

### 1. Intervention title and evidence source:

Brown J, Katikireddi S V, Leyland A H, McQuaid R W, Frank J, Macdonald E B (2018), 'Age, health and other factors associated with return to work for those engaging with a welfare-to-work initiative: a cohort study of administrative data from the UK's Work Programme', *BMJ Open*, 8(10), e024938

### 2. Policy or intervention in context:

The policy context was looking at the all age focus to for different benefit channels (JSA and ESA) in the Work Programme – the UK's main publicly funded return to work programme. It assessed any contrasting effects on return to work (successful outcomes and duration to outcome) and in particular to unpick health and associated age-related influences for those with (ESA) and those without an illness, health condition or disability that makes it difficult to work (JSA).

### **3. Monitoring, evaluation and available evidence:**

The first study to use large-scale administrative data (over two-years) to assess the influence of age, health and other factors on outcomes and experiences of returning to work in the governments Work Programme. Although limited to clients in Scotland, it provides:

- A refined statistical analysis over time with contrasts between Jobseeker's Allowance (JSA) and Employment Support Allowance (ESA) clients (analysed separately)
- Analysis in cohorts (N=13,318 clients 18-64 years) using Piecewise Poisson regression analysis to calculate incident rate ratios using data from 2013 to 2016.
- A focus on contrasting outcomes for JSA and ESA clients in the Work Programme to assess age effects within different activity regimes, and effects of co and multiple morbidities.

The 50+ sample (N = 1406 JSA clients and 1322 ESA clients) provided for modelling age as a continuous variable rather than the single age category (50+ years) of other studies.

### **4. Stakeholders and partners involved:**

An MRC funded study led by the Healthy Working Lives Group of the University of Glasgow with the involvement of the Scottish Governments Chief Scientists Office, and academics also from the universities of Stirling and Edinburgh.

### **5. Targets groups and targeting:**

Beneficiaries in Scotland on the UKs 'Work Programme'; all age analysis (18-64) of JSA and ESA beneficiaries.

## 6. Intervention effectiveness:

This initial analysis showed JSA clients (62%) were much more likely to return to work (RTW) than those classified as having an illness, health condition or disability that made it difficult to work - ESA clients (20%). More specifically the analysis showed:

- A strong negative relationship between age and the predicted probability of having a job start during the 2-year engagement with the programme for both JSA and ESA
- JSA clients were most likely to RTW early (<3 months), especially for young clients although the (negative) age effects show little difference in RTW probability for younger and 50+ after 9 months
- Gender was an influence on RTW for JSA but not ESA clients with women JSA claimants showing less positive outcomes and notably for early returns to work
- For ESA clients the predicted probability of having a first job start was fairly constant over the 2 years; ESA clients with parental responsibilities showed stronger RTW probabilities than those without
- Health, including the number of health conditions, length of unemployment, client perception of job start and other individual factors were associated with job start probability for both groups.
- Non-child care responsibilities, including eldercare, appear to have held back RTW for JSA clients – 49% against 63% without non-child care responsibilities (although numbers are relatively small for confident analysis).
- Age plays an important role in influencing RTW in both groups; however it also showed strong influences of other (potentially modifiable) factors in particular the length of unemployment, and the management of multi-morbidity challenges in clients
- A further modifiable influence was the individual's perception of the likelihood of job start where pre-conceived barriers could act as a substantial negative influence for older clients.

The effects of different in-programme interventions are being reviewed by age and benefit type, but while the most likely intervention was 'advisor appointments' the analysis has not yet been able to differentiate within these by what clients received from advisor inputs.

## **7. Success factors and transferability:**

Age, health and a variety of socioeconomic factors play an important role in influencing RTW for unemployed people and for people who have an illness, health condition or disability that makes it difficult to RTW. The authors have suggested the findings raise the importance of tackling modifiable constraints on RTW in any age specific or age targeting within support programmes, and that return to work outcomes may be improved by providing integrated interventions which focus on health and “biopsychosocial” factors to enable more people to realise the potential health benefits of returning to work.

## Fiche Number 5: P.14 (and P9, P13)

### Key Learning Points

A three-phase composite study looking at the scope and need for better age-sensitive recruitment and working practices from the UK's professional body concerned with HRM and HRD and showing:

- UK employers are responding ineffectively, and often only reactively to workforce aging by focussing on compliance with legislative measures
- There is too little attention to developing more pro-active measures of extending working lives such as older workforce retention, and management and development of an ageing workforce
- There is little focus on the needs of older workers for modified and more flexible working opportunities, or of distinctive caring responsibilities for older employees
- Organisation line and other functional managers are too often ill-equipped to promote teamwork in age-diverse teams, and widely lack the skills, training or awareness to cope with this
- Many employers continue to demonstrate inertia and adjustment rigidities for support to existing older employees for extending working lives.

### 1. Intervention title and evidence source:

CIPD (2016), *Creating Longer, More Fulfilling Working Lives*. Policy Report, Chartered Institute of Personnel and Development. London.

Also drawing on evidence from linked CIPD studies:

CIPD (2014), *Managing an age-diverse workforce: Employer and employee views*. Chartered Institute of Professional Development, Report of Survey. London

CIPD (2015), *Labour Supply and the Ageing Workforce*. Policy Report, Chartered Institute of Personnel and Development. London

## **2. Policy or intervention in context:**

AS the professional body concerned with human resources management and development in the UK, the CIPD has conducted a number of past research studies on ageing in the workforce. This most recent contribution has centred on the scope for employing organisations to make the best of an ageing workforce and contribute to the economic and societal challenges of extended working lives challenges. Its focus is robustly on age-focussed recruitment, adjusted working practices and related internal labour market issues.

## **3. Monitoring, evaluation and available evidence:**

The study was conducted in three inter-related phases, differently sourced, for:

- An industry survey of age-sensitive working practices (2014)
- A profession-based analysis of these practices set against wider labour and skills supply challenges, productivity pressures and rising customer service expectations (2015).
- A composite assessment (2016) with international contrasts providing a CIPD perspective on the need for better practices notably at organisation level and public policy responses to enable these.

## **4. Stakeholders and partners involved:**

This was a CIPD-led initiative with the 2nd study collaborating with the International Longevity Centre in the UK (ILC-UK) and contributions from the Institute of Employment studies (3rd report).

## **5. Targets groups and targeting:**

Target groups are employers with a 50+ workforce – predominantly in the UK, but drawing on comparative studies of working practices in Czech Republic, Denmark, France, and Germany (2016 study).

## **6. Intervention effectiveness:**

The composite analysis shows a raised profile for age-related issues and implications for workforce management in UK employing organisations but also some rigidities in embracing age-sensitive employer practices. The evidence suggests:

- HR in UK organisations tends to respond to ageing issues reactively – responding to legislative (e.g. age discrimination) and other issues but with a lack of organisational activity and attention to ensure enough skilled and diverse people of all ages are currently being recruited and retained
- Organisation line and other functional managers appear to be ill-equipped to promote teamwork in age-diverse teams, and do not recognise this as a weakness for organisations
- Organisation provisions for employee health and well-being are seemingly strong, but there is less provision for supporting the extension of working life with this issue generally neglected across HR practice
- A particular concern is with active management of flexible working opportunities as a health and welfare response to age-sensitive working practices, and where organisational innovation often neglects distinctive ageing workforce issues and needs
- Older employees with caring responsibilities appear to be an invisible group, with a need for employers to be more sensitive to the physical and emotional needs of older (and other) carers and for line manager training to sensitise them to the needs of carers.

Overall the analyses set out adjustment rigidities in organisations, especially for extending working lives and the need for a focus to build momentum for age-sensitive adjustments in line which accommodate better individual employee and organisation needs and workforce supply constraints.

## **7. Success factors and transferability:**

The CIPD research is relevant in that it goes beyond a meta-analysis to provide empirical evidence of current workplace practices (and rigidities) and innovation from the UK and four other European countries. Its relevance to place based actions may be more limited since its focus is on organisational age sensitive practices relating to older workers in employment. However, it sets out eight specific proposals for enhanced employer practice which mix age specific and all-age practice which is age-sensitive:

- Workforce planning and age diversity monitoring
- Active support measures for employee health and well-being
- Creative and cohesive provision for people with care responsibilities
- More flexibility in working time
- More broadly based training and development sensitive to different learning styles
- Active and progressive approaches to management of retirement
- Building an inclusive and age diverse culture sustained by line managers and others
- Tailoring HR solutions to suit individual needs and training managers to support this.

These principles have an evidence underpinning, and the credibility of origination in the UKs HR professional body and may help build employer capacities to recruit and retain 50+ returners to work and in particular to provide for more sustainable opportunities for over 50s.



## Fiche Number 6: G 2

### Key Learning Points

- Limitation of the research limit what can be confidently claimed to work for getting 50+ jobseekers back into work.
- Support needs to recognise the diversity of the 50+ group but some of the older jobseekers (60+) were not eligible for some programmes;
- For low qualified training or retraining could have significant employment gains ;
- Addressing ageism in the workplace is essential, as is building up the confidence of older jobseekers (through coaching) and employers need to be convinced of the business case for employing an older worker.
- Alternative forms of work (part-time was covered here) can provide a viable route back into work though some financial support may be needed.

### 1. Intervention title and evidence source:

DWP (2010) *50+ back to work evidence review and indicators guide for secondary analysis* DWP Research Report No 615 by Policy Studies Institute (PSI)

[http://www.psi.org.uk/pdf/2010/dwp\\_rrep615.pdf](http://www.psi.org.uk/pdf/2010/dwp_rrep615.pdf)

### 2. Policy or intervention in context:

A useful overview of pre-2010 27 reports covering 10 programmes or pilot programmes including the various permutations of New Deal, looking at the programme findings and any limitations of the research leading to these conclusions. Focused on six types of back-to-work intervention:

- advisory support;
- training;
- work experience;
- wage supplements;
- other financial support; and
- health interventions.

### **3. Monitoring, evaluation and available evidence:**

Draws on available evidence over period 2000-2008 but could not assess 'what works' because none of the evaluations used comparison groups. Complications also arise because some programmes have multiple targets (e.g. different age groups). Some studies used impact analysis.

The review concluded that 'for the purposes of this study, the technical quality of the evidence was generally insufficient for assessing what works'.

Most of the evaluations were conducted when the economy and labour market were strong and the findings may not necessarily apply in different conditions.

### **4. Stakeholders and partners involved:**

The various programmes covered in the report were mainly organised through DWP/JCP though in many cases (e.g. New Deal) had significant sub-contracted elements.

### **5. Targets groups and targeting:**

The focus of the review was jobseekers aged 50 and over though many of the programmes (e.g. ND 25+) had multiple ages groups within eligibility which complicated analysis by the older age group. Also there was very little on the 60 and over age group, partly due to the restrictions on entry to certain programmes by age.

### **6. Intervention effectiveness:**

Key points emerging from the review on effectiveness include:

- New Deal 25+ the mandatory intensive Activity Period saw a significant increase in employment levels among the 50+, sustained for two years with the effect stronger for the 50-55 group than older;
- Across the different programmes advisory support given by an adviser close to the age of the client was considered 'an asset';
- There were significant employment gains in the Work-Based Learning for Adults (WBLA) programme for 50+ in both shorter and longer periods of training;
- In general programmes targeted at 50+ had lower take up than younger age cohorts;
- Older clients from managerial and professional backgrounds are not well-served and need specialist attention.
- Otherwise there did not appear to be any significant difference between employment outcomes for mandatory and voluntary participation in (parts) of programmes.

## **7. Success factors and transferability:**

Some of the broader issues emerging from the review include:

- Support needs to recognise the diversity of the 50+ group;
- For low qualified training or retraining is likely to be needed;
- Addressing ageism in the workplace is essential, as is building up the confidence of older jobseekers (through coaching);
- Awareness-raising among 50+ of part-time job opportunities and some assistance through social security to ensure financial gain.
- Employers need to be convinced of the business case for employing an older worker.

Some of these issues have been taken on board in subsequent interventions (e.g. work coaches) though the process of changing attitudes among employers and jobseekers 50+ is ongoing.

# Fiche Number 7: G 13

## Key Learning Points

- Effective recruitment of older workers is a collective responsibility with all those concerned – employers, individuals, agencies (e.g. JCP, education and training providers) and government.
- Eliminating conscious and unconscious bias towards age in the workplace through changing attitudes is crucial.
- Bringing together the key players (albeit without enough coverage of SMEs) to agree a strategy is potentially effective and could work well in a local (e.g. GMCA) context.
- Actions need to be supported by effective funding which encourages, for example, real skills training/retraining for sustainable employment.

### 1. Intervention title and evidence source:

DWP (2017) – *Fuller working lives: A partnership approach*

Main report plus evidence base report and statistical reference tables and charts

<https://www.gov.uk/government/publications/fuller-working-lives-evidence-base-2017>  
and

<https://www.gov.uk/government/publications/fuller-working-lives-a-partnership-approach>

### 2. Policy or intervention in context:

The report builds on the Altmann report 'A New Vision for Older Workers' (2015) and sets out the justification for a more positive approach to older workers in the labour force, covering those in work and those looking for work. Key sections cover retaining existing staff, retraining them and recruiting new staff from the older age group, the latter section being the most useful for this review.

It looks at (mostly) the 50+ age group and how they are perceived in the workplace (lots of evidence of conscious and unconscious age discrimination) which extends to their involvement in training/retraining and in recruitment. It recognises that government policy has been helping create the right backdrop (e.g. no default retirement age, request for flexible working, etc.) but this by itself will not lead to a more positive attitude towards older workers. Broadly it requires a change in attitude among all the key players – employers, agencies (such as JCP and education and training providers), government and, importantly, individuals (though here this can be shaped by developments in all the other players).

### **3. Monitoring, evaluation and available evidence:**

The report was based on secondary research and qualitative sources with an employer-led Business Strategy Group who delegated various tasks to working groups. The evidence base is fully laid out and includes comparative data from a variety of sources. It is written in an easily accessible style, though this could lead to suggestions that its findings are rather too broad and lack specific measures for the key players to act upon. The activities of government could be considered over-played I that some of the measures (e.g. on access to training/retraining) still fall far short of what is needed. Also, the strategy group behind it is dominated by big employers and what goes for them is unlikely to sit quite so easily with SMEs – where much of the potential recruitment of older workers lies.

### **4. Stakeholders and partners involved:**

While the report was commissioned by government (DWP) it aimed to be inclusive and this is to some extent evidenced in the composition of the Business Strategy Group which comprises not just individual employers (and their representative bodies) but also the TUC, Age UK, Business in the Community and the CIPD. However, big business dominates and there is no apparent representation from smaller employers. Also, the findings of the report are advisory and so may not be taken up by the partners involved – especially where there are substantial funding implications.

### **5. Targets groups and targeting:**

The focus of the report is the cohort of older workers (50+) currently in work and those looking for work. The background is the demographic challenges employers will face with an ageing workforce and depleted labour supply and the recent governmental initiatives (e.g. revoking of default retirement age, extension of rights to request flexible working, pension changes) that should help keep people in work longer. There is no real segmentation of the different age groups though there are other reviews by different skills, etc.

## 6. Intervention effectiveness:

The findings are broad but contain some useful pointers to help encourage more recruitment of older workers. A starting point for bringing about change is to encourage employers to see the inherent value in older workers and research for the report shows that characteristics such as experience, reliability, mentoring role, etc. are important to emphasise. But it is also important not to avoid the requirements that some older workers might need such as more flexibility (e.g. if they have caring responsibilities), health issues and training/retraining to allow them to adapt their skills and experience over time. The report acknowledged that many employers were not yet taking active steps to cater for an ageing workforce and this needs to be addressed (though the report was less prescriptive on what should be done).

For the recruitment of older workers those helping jobseekers find work need to be aware of the attributes that employers see (as above) and build on these.

But individuals also have a role in having realistic expectations of their job prospects and how they need to adapt. This is particularly so where training/retraining is concerned. That available through JCP-led programmes such as SBWAs only offer short-term training which is likely to offer some updating at best. Those needing (and wanting) more thorough training must find the relevant course, provider and funding. Here the report tends to overplay the current efforts by government. The ideas on retraining (and lifelong learning) are weak, suggesting that the changes (current and planned) to the adult skills training system will make it easier for older workers to retrain. The apprenticeship options are limited and funding sources for individual retraining (e.g. Professional and Career Development Loans and Extended Advanced Learning Loans) unattractive (or inaccessible) to many jobseekers.

Developments in JCP with the introduction of 'Older Claimant Champions' are welcomed (though with just one in each of the 34 JSA areas the commitment is small) and more on-line support (though this needs to be matched by IT training for any older jobseekers needing it). The report offers ideas on what could contribute to a change of attitude including:

- Implementation of 'age-blind' recruitment policies
- Employment agencies should ensure they avoid any age discrimination in their dealings with employers.
- Line managers in recruiting firms are fully trained in awareness of older workers and how to offer effective support if needed.
- Provide training in ways to avoid unconscious age bias.
- In shortlisting for vacancies ensure that experience in a role is recognised and qualification alone are not relied on as the filter for ability to do the job.
- Remove any age limits for job vacancies and training opportunities.
- Employers doing succession planning should not assume that the post vacated will be filled by a younger recruit.
- Offer support to older jobseekers (according to their needs) in career counselling, CV writing, digital skills (including social media and online recruitment platforms), etc.

## **7. Success factors and transferability:**

All the findings of the report have some transferable value, particularly those on how employers and jobseekers can be encouraged to overcome conscious and unconscious bias. In particular, the approach of bringing together the key players (albeit without enough coverage of SMEs) to agree a strategy is potentially effective and could work well in a local (e.g. GMCA) context.

## Fiche Number 8: G15

### Key Learning Points

- Participants need good pre-entry information on the programme and referrals should be appropriate to the circumstances of the participant and their wishes.
- Recruiting employers to participate in the programmes is essential and the availability of a central focus approaching employers nationally (such as the DWP national team) is crucial.
- Participants also benefited more from moving into employment areas that were new to them and so offered a real opportunity to try something different.
- Employers need to have some recruitment needs and have confidence in JCP as a recruitment channel if they are to be effective partners in the programmes.
- Participants in the SBWA option did best when all three elements (i.e. pre-employment training (which was mandatory), work experience placement, and guaranteed interview). Were completed.
- Positive job outcomes following participation were more likely in the SBWA programme (partly because they were closer the labour market than those on the WE programme) but benefit from support immediately following completion of the programme.

### 1. Intervention title and evidence source:

DWP (2017) *Sector-based work academies and work experience trials for older claimants*

DWP Research Report No 938

<https://www.gov.uk/government/publications/sector-based-work-academies-and-work-experience-trials-for-older-claimants-ombined-quantitative-and-qualitative-findings>



## **2. Policy or intervention in context:**

The use of Sector-Based Work Academies (SBWA) and Work Experience and training (WE) programmes have been available to younger claimants (18-24) for some time and demonstrated some success in job outcomes for participants and so trials were set up to gauge if they could have similar effects to the older claimants (in this case 45+). At the time of the trials, any claimant could be referred to the programmes but take up among older clients was low.

The two programmes are voluntary and intended for different groups of participants (according to their distance from the labour market) and have the following ingredients:

- SBWA – maximum period of 6 weeks with mandatory pre-employment training, a work experience placement and guaranteed job interview at the end.
- WE – a placement of between 2-8 weeks involving 25-30 hours per week.

The two options were already available to JCP work coaches, but use was low for the older cohort and the trial was aimed at testing if higher engagement of staff would improve take-up.

The trials were limited to two JCP areas each with the SBWA in Tyne & Wear and Birmingham and Solihull, and WE and training in West Yorkshire and the Black Country), all carried out between April 2015 and March 2016.

### **3. Monitoring, evaluation and available evidence:**

The evaluation was based on the following two elements:

- Qualitative research involving 60 participants and 19 host employers,
- Quantitative research of 1,000 older claimants (45+) of which 125 were on the SBWA option and 386 on the WE option, plus 600 non-participants.

Of the total sample, for the SBWA trial 38% were 45-49 and for the WE trial 32% were 45-49, with 32% of the non-participants in this age cohort. These high proportions in this age group not normally considered to be in the older age category (i.e. 50+) could have the effect of skewing the results. There is no detailed segmented analysis by age-group within the broad over 45s which is a shortcoming in the research. There are some indication that outcomes for the two programmes were better for those aged under 55, which might be expected in any case.

The main aims of the evaluation were to see if those aged 45+ could benefit from the programmes, focusing on:

- Why older claimants and employers take part.
- How employers viewed the programmes.
- Whether provision was suitable for older claimants.
- Impact of provision on claimants (though findings here were not a proper impact evaluation which was planned for a later stage).

The trials were limited to four areas though each was a large urban area likely to have many similar characteristics and context to the GMCA area.

### **4. Stakeholders and partners involved:**

Funding for the trials came from DWP co-financed by the Department of Education (DE).

The programmes were led by JCP where work coaches were encouraged to suggest to suitable candidates that they could participate in the trials. Employers are recruited to the programmes mainly by the DWP's National Employer and Partnership team negotiating with employers at a national level, supplemented by offers from local employers, education and training providers, voluntary and community organisations, etc.

## **5. Targets groups and targeting:**

The gateway to participation was through the JCP work coaches who were encouraged to promote the two programmes to suitable candidates, emphasizing the voluntary nature of participation.

The two programmes are open to benefit claimants on Jobseeker's Allowance (JSA), Universal Credit (UC) and Employment & Support Allowance (ESA) from the first day of their claim being successful. While participation is voluntary, and claimants can put themselves forward, under the SBWA failure to attend the pre-employment training or guaranteed interview could result in sanctions being applied.

SBWA were mainly motivated to take part to help find a job (44%) with an opportunity to improve their skills coming second (37%). WE participants tended to be further from the labour market and so job expectations were lower (25%) with obtaining some recent work experience (23%) also featuring.

Employers tended to take part for one (or more) of three reasons – to meet recruitment needs, for altruistic reasons of helping people back into work, and because they had a positive experience of JCP in recruitment.

## **6. Intervention effectiveness:**

The reported results were generally quite positive from all aspects with evidence suggesting: both programmes helped participants

- Overcome age-related and other barriers to work.
- Become more job-ready.
- Improve confidence and wellbeing.

The success of the programmes in moving participants closer to the labour market was less clear given the information base and focus of the evaluation, but indications are that they did help some though it is not possible to be more specific. However, there was little analysis by age group but some suggestion that positive outcomes were mainly focused on the 45-55s in the sample.

Both programmes were assessed to be appropriate for older workers if they are well-organised, structured and offer genuine exposure to sector-relevant training and work experience.

## **7. Success factors and transferability:**

The success of any use of the programmes will be influenced by the following:

- Participants need good pre-entry information on the programme and referrals should be appropriate to the circumstances of the participant and their wishes.
- Recruiting employers to participate in the programmes is essential and the availability of a central focus approaching employers nationally (such as the DWP national team) is crucial.
- Participants also benefited more from moving into employment areas that were new to them and so offered a real opportunity to try something different.
- Employers need to have some recruitment needs and have confidence in JCP as a recruitment channel if they are to be effective partners in the programmes.
- Participants in the SBWA option did best when all three elements (i.e. pre-employment training (which was mandatory), work experience placement, and guaranteed interview). Were completed.
- Positive job outcomes following participation were more likely in the SBWA programme (partly because they were closer the labour market than those on the WE programme) but benefit from support immediately following completion of the programme

## Fiche Number 9: INT 6

### Key Learning Points

- Mobilisation of local partnerships – bringing together the key local players to work in concert for the labour market integration of older workers is essential means that policies and approaches can be geared to local circumstances (economic, social, etc.).
- Integrated approach – the involvement of active measures needs to be supported by other measures such as those on health, care responsibilities, etc. to prevent these acting as barriers to getting back into the LM.
- Lifelong learning culture – employers, employees and jobseekers need to recognise (or be educated in this) that training and retraining is a continuous process if employability is to be maintained. There also needs to be infrastructure and funding to enable this to happen, though employers must take some of the responsibility for this given the direct benefits it confers on the business.

### 1. Intervention title and evidence source:

'*Perspektive 50 plus*' (Beschäftigungspakte für Ältere in den Regionen) – Employment Pacts for Older People in the Regions.

EC Mutual Learning database of national labour market practices

<http://ec.europa.eu/social/keyDocuments.jsp?policyArea=&type=0&country=0&year=0&advSearchKey=prolderworkers&mode=advancedSubmit&langId=en&orderBy=docOrder>

## **2. Policy or intervention in context:**

The policy directly addresses the comparatively low participation rate of older workers due to obsolete skills, decreasing employability and psychosocial obstacles, especially for the long-term unemployed. Added to this is the inadequate awareness of local employers and institutions and lack of interest in older recruits despite growing skills shortages, some of which older jobseekers may have.

The principal aim of the measure is to increase the LM participation of older workers through individual support (especially to those long-term unemployed) and mobilisation of the local institutional networks to promote the recruitment of older workers. This is achieved through creating local responsibilities and the establishment of regional networks through 'employment pacts' or partnerships in the regions of implementation.

The approach allows jobcentres to support the LTU and older workers individually, but also allows them to engage as partners in regional networks in collaboration with other partners. In this way jobcentres function as the mediators between older workers, social partners and potential employers. An important part of this process was to promote local awareness among partners and employers of the demographic challenge and the key role older jobseekers could play in alleviating its negative effects.

The integration of older unemployed into the labour market was recognised as a complex process given the likelihood of professional, personal and social barriers to entering employment, couple with the often-negative attitudes of employers and so a comprehensive approach was needed.

## **3. Monitoring, evaluation and available evidence:**

The approach has been monitored and evaluated at least annually and at various stages but particularly over the period 2008-2010. Internal PES monitoring is part of the normal management process for ALMPs focusing on indicators of labour market integration of older unemployed particularly over time. An external evaluation was carried out by the University of Duisberg-Essen.

Overall effects were deemed to be good, though deadweight effects were present for some cases where the subsidy was paid (the employers would have employed the older jobseekers even without the subsidy). However, because there was a commitment for those employers receiving the subsidy to keep workers on after the subsidy period ended, this at least guaranteed a prolonged working period for the subsidised workers. It could also mean that some of the employers reluctant to take the subsidy did so because they were not prepared to guarantee the length of job.

#### **4. Stakeholders and partners involved:**

PES jobcentres are the main focus of implementation but work with the regional networks comprising:

- Employers.
- Chambers and associations.
- Educational institutions.
- Municipalities.
- Politicians.
- Social partners.
- Religious bodies.
- Social organisations.

The Executive Board of the PES at regional (Laender) level were responsible for the developing the overall strategy and funding, introducing it in phases (2005-2007, 2008-2010 and 2011-2015). In 2012 there were 78 regional pacts in place. Some of the functions are now mainstreamed into PES practice.

## **5. Targets groups and targeting:**

The target group are those long-term unemployed aged 50+ (to 64) and the integrated approach involves the following range of activities:

- Support to identify the right job candidates – development of job descriptions and jobcentre counsellors supporting employers (especially SMEs) in identifying suitable candidates.
- Integration subsidy and tailored support – pays up to 50% of the wage of the recruit (for a maximum of 36 months) thereby removing some of the risk of employing an older worker. The employer is obliged to keep the worker on after the subsidy ends for at least as long as the subsidy period. Employers receive tailored advice the support integration of the older worker.
- Knowledge exchange – participants in regional pacts could learn from each other through dissemination of good practices (workshops and online platform).
- Services to the unemployed older workers includes:
  - > Profiling – jobseeker counsellors carry out a social and professional profiling of jobseekers to better match them with employers.
  - > Liaison with employment agencies – jobcentres work with employment agencies to offer older jobseekers more variety in their job search methods.

## **6. Intervention effectiveness:**

The policy was started in 2005 and continues in place which can be taken as testimony to its effectiveness.

Broadly the measure has led to the increased labour market participation of older workers. For example, in 2011 over 200,000 older unemployed (mostly with multiple problems such as low or no qualification, poor language ability, etc.) participated in the measure and over 70,000 (35%) entered employment but only about one-third of the employment contracts needed the subsidy, suggesting that the intensive work of counsellors with jobseekers and employers paid off.

However, there is only limited information readily available on how the measure worked in different regions and areas, or for different age groups within the overall cohort, though the indications are that it was most successful for those under 60



## **7. Success factors and transferability:**

The context of the German labour market (generally high employment/low unemployment, strong emphasis on skills development) is one factor to consider, though labour markets across the regions are not homogenous and the measure also covered periods either side of the Great Recession.

Key factors in considering transferability include:

- Mobilisation of local partnerships – bringing together the key local players to work in concert for the labour market integration of older workers is essential means that policies and approaches can be geared to local circumstances (economic, social, etc.).
- Integrated approach – the involvement of active measures needs to be supported by other measures such as those on health, care responsibilities, etc. to prevent these acting as barriers to getting back into the LM.
- Lifelong learning culture – employers, employees and jobseekers need to recognise (or be educated in this) that training and retraining is a continuous process if employability is to be maintained. There also needs to be infrastructure and funding to enable this to happen, though employers must take some of the responsibility for this given the direct benefits it confers on the business.

## Fiche Number 10: INT 7

### Key Learning Points

- Persuading employers to develop action plans for the employment of older workers can help change attitudes and bring about results.
- French companies are required to do this through legislation which ensured a very high degree of compliance.
- The lack of involvement from employee representatives in formulating the plans was a mistake by the companies that was soon remedied in any revisions.
- Plans worked well in altering the attitude and practices for older workers in the companies but had little effect on recruitment practices.
- Persuading employers to have such action plans on older workers may be possible in an environment such as the UK where the approach is for businesses to engage voluntarily in such measures.

### 1. Intervention title and evidence source:

Employment policy to promote active ageing in France (part of European Commission DG EMPL review of Member State policies in 2012 (unpublished)).

## **2. Policy or intervention in context:**

France has a comparatively low employment rate for the 50+ cohort and especially for those aged over 55. This is largely due to a combination of factors including early retirement options, generous social benefits and pensions at 60. Among employers and individuals in work and out of work, this created a culture whereby over 45 was widely considered to be the age for being described as an older worker. The cost to the economy and exchequer were significant and would only get worse with the demographic trend.

This led the government in 2010 to tackle the issue from three perspectives: 1) Active Labour Market Policy (ALMP); 2) Social benefits; and 3) Pensions. Among these actions, two policies stand out:

- Financial assistance to employers recruiting over 55s.- from the Retirement Act 2010 employers taking on an unemployed person over 55 for at least one year was entitled to a subsidy of EUR 2,000 (Contrat de Professionnalisation) with social security exemption if the person was kept on after the subsidised year. The age threshold was lowered to 45+ in response to the difficult labour market situation after the Crisis. Employers also enjoyed a tax break on training costs for the subsidised employee.
- Action plans relating to the employment of older workers – from 2010 companies with over 50 employees have been obliged to conclude agreements on action plans relating to the employment of older workers. Employers were required to show quantitative objectives for recruiting and monitoring older workers and propose effective measures to achieve this, along with monitoring arrangements.

## **3. Monitoring, evaluation and available evidence:**

Those employers not complying with the requirement for the agreement on action plans for older workers were subject to a fine equivalent to 1% of payroll. This seemed to work and by September 2010 39,000 employers had a plan covering in excess of 12 million workers. The requirement was subject to independent evaluation (see section 6 below).

## **4. Stakeholders and partners involved:**

Employers with more than 50 employees were required to formulate plans but there were no obligations to involve employee workplace representatives such as trade unions or works councils. This was soon seen as a mistake and consultations with these groups then developed quickly.

## **5. Targets groups and targeting:**

The focus of the action plans were workers 50+ in larger employers with 50 or more employees. This was a legislative requirement on firms, with a fine if they did not comply. However, there appears to be less scrutiny of the actual content of the agreements and employers had a high degree of freedom to specify what was covered, subject to the basic parameters set.

## **6. Intervention effectiveness:**

An independent evaluation of the action plans emerged with mixed results. In general there was a low level of creativity in the measures taken including:

- Skills development and access to training – most action plans made a commitment to give access to training for the 45+ group.
- Knowledge and skills transmission or developing tutoring – such as increasing the number of tutors and trainers among older workers.
- Anticipating the evaluation of careers – by such means as an individual's right to training, recognising prior learning, and career interviews at least every 5 years.

Few agreements included much on the recruitment of older workers (though when the plans were introduced, recruitment activity was low post-Crisis).

Most agreements were concluded at branch level (rather than at head office level) and so this was theoretically better to ensure actions were carried out. One problem was that quantitative information was often vague which made monitoring difficult.

Overall, the requirement for the action plans were seen as successful in bringing the older worker issues to the fore in employers and contributed to changes perceptions.

## **7. Success factors and transferability:**

The main benefit from the action plans on older workers was the way in which employers identified and recognised the particular issues facing older workers. However, the use of a significant financial penalty to encourage compliance appeared to work, though there was less external monitoring of what was in the plans and how they developed and worked. This might help explain why there were few provisions for the recruitment of older workers, though clearly those joining a company with an effective plan would benefit from its provisions once inside.

Persuading employers to have such action plans on older workers may be possible in an environment such as the UK where the approach is for businesses to engage voluntarily in such measures. This could be done through existing social partners such as employer organisations, chambers of commerce and trade unions, as well as LEPs.

# Fiche Number 11: INT 10

## Key Learning Points

- Use of local service centres (Job Hope Centres) dedicated to helping older vulnerable workers (from age 40+);
- Regular collaboration between local employment service providers (public, private, NGO and vol/com) to deliver joint actions.
- An effective support programme (Employment Success Package) proven to deliver sustainable employment outcomes for older jobseekers.
- The initiative of a national SME body to give unemployed jobseekers the opportunity to gain work experience filling in for regular employees on temporary leave of absence.

### 1. Intervention title and evidence source:

Korea has various methods to help older workers (50+) find work or make the transition from early retirement from their main job to another job or carer, including: Local employment offices (municipalities), Job Hope Centres, and the Employment Success Package programme.

Information source: OECD (2018) Working Better with Age: Korea (OECD Ageing and Employment Policies) [https://read.oecd-ilibrary.org/employment/working-better-with-age-korea\\_9789264208261-en#page1](https://read.oecd-ilibrary.org/employment/working-better-with-age-korea_9789264208261-en#page1)

## **2. Policy or intervention in context:**

Korea faces the fastest-ageing economy among the OECD countries yet has one of the lowest unemployment rates (under 3%) and few long-term unemployed and highest employment rates, particularly among older workers (for example, 33% of those aged 70-74 are still working). The main problem is that many workers are forced to retire early (usually at 55) from their main job and forced on to the labour market where the principal options are low quality, low paid, precarious jobs in fields not necessarily related to their skills and experience. Social security and unemployment benefits are low and so do not present an option for those wishing to withdraw from the labour market. Expenditure on ALMPs is also low and (according to the OECD) too concentrated on direct job creation schemes which have been shown to have very low post participation employment rates.

- Local employment services – PES operate at national and local levels (municipality level) in collaboration with other providers in the public, private and vol/com sectors with (in some areas) regular quarterly meetings between agencies in an area to exchange ideas and develop joint initiatives.
- Job Hope Centres – aimed at those (mostly vulnerable) unemployed (and pre-retirement) aged 40 & over offer a range of customised re-employment services, retraining, subsidies and counselling services which can also be delivered in employers.
- Employment Success Package Programme – open to all unemployed jobseekers but includes a high proportion of 50+ and offers: intensive counselling; targeted training and business start-up advice; job placement support; and financial incentives to participate and stay in work.

## **3. Monitoring, evaluation and available evidence:**

The current main use of ALMP expenditure has been shown to have low employment outcomes. But short-term retraining offers better results for sustainable transitions into the LM – provided that the training is based on LM needs.

Evaluation of the Employment Success Package Programme in 2014 showed that for participants aged 50+ the employment rate was consistently above that for non-participants and at three years in employment around 60% were still in work (42% for non-participants).

The OECD identified a major problem with the services in that they are under resourced which is reflected in the staffing numbers – the counsellor to customer ratio (caseload) is very high and even in the Job Hope Centres it is 500:1 which is not conducive to the intensity of support they aim to give.

#### **4. Stakeholders and partners involved:**

Local employment services operate in collaboration with other providers in the public, private and vol/com sectors with a variable level of collaboration dependent on the area (there is no requirement to work closely together).

The Job Hope Centres (of which there are 31 spread across the country) are managed by the tripartite Korea Labour Foundation though receive government funds.

#### **5. Targets groups and targeting:**

The somewhat unique circumstances of the Korean labour market show that the most vulnerable older workers are those aged 55 and over who are forced into taking early retirement from their main job but must seek alternative employment to avoid poverty. This acts as a powerful incentive for them to take any job and employers have responded by creating lots of short-term, low-paid and low-quality jobs. The high employment rate means that the jobs issue extends into their 70s for many workers.

The policy approach has been mixed and apart from the support measures listed in 2 above, there are increasing efforts to strengthen second career guidance for middle-aged and older workers in work to help ease the transition between careers. Here the ALMPs run by the PES have an active role to play such as funding retraining. However, the OECD noted that more needs to be done to develop lifelong learning opportunities and improve access to vocational training.



## **6. Intervention effectiveness:**

The employment services such as local jobcentres and the Job Hope Centres receive comparatively low funding, and this is reflected in adverse caseload figures, so it is impressive what is done with these limited resources. Part of this is through local collaboration between service providers (including private employment agencies, NGOs and vol/com bodies). The main problem they face is dealing with a labour market for older workers that mainly offers low-quality, low-paid temporary work which is not the most optimal use of the skills and experience of the older workers displaced through an early retirement tradition (which is being addressed but will take time). Therefore, more emphasis is being placed on recognising the skills and experience of older workers with this prior learning linked to certification that will have currency in the labour market. It also provides an opportunity to identify skills gaps in the jobseeker and use training support to update them.

One more interesting development comes through the National Human Resources Development Consortium for SMEs which provides, inter alia, training and external opportunities for firms to recruit the unemployed. It is trialling a scheme whereby firms can receive a subsidy if they recruit an employed person to fill a post temporarily vacated (perhaps for illness, caring, sabbatical, maternity, etc.) which helps the employer having to recruit from the labour market (with all the implications of that) and gives the unemployed person real work experience. The hope is that it could lead to the unemployed person proving themselves and perhaps receiving a permanent job offer but the schemes is too new to show any firm results.

## **7. Success factors and transferability:**

The labour market and institutional setup in Korea is quite unique in many ways, particularly the comparatively high employment rate for older workers, albeit many in lower quality and lower paid jobs than they were used to before early retirement. However, there are several features to their approach in helping older jobseekers that are useful to consider as follows:

- Use of local service centres (Job Hope Centres) dedicated to helping older vulnerable workers (from age 40+);
- Regular collaboration between local employment service providers (public, private, NGO and vol/com) to deliver joint actions.
- An effective support programme (Employment Success Package) proven to deliver sustainable employment outcomes for older jobseekers.
- The initiative of a national SME body to give unemployed jobseekers the opportunity to gain work experience filling in for regular employees on temporary leave of absence.

This report is available at [www.ageing-better.org.uk](http://www.ageing-better.org.uk) | For more info email [info@ageing-better.org.uk](mailto:info@ageing-better.org.uk)

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The Centre for Ageing Better received £50 million from The National Lottery Community Fund in January 2015 in the form of an endowment to enable it to identify what works in the ageing sector by bridging the gap between research, evidence and practice.