

## Review Article

# The Information, Advice and Guidance Needs of Older Workers

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*This article reviews the research on Information, Advice and Guidance (IAG) services for older workers in England. It sets out the arguments for targeting IAG services at older people in the context of extended working lives. It reviews the evidence on how to provide services which meet the specific needs of older workers, whilst recognising the diversity of the 50+ age group, and provides a case study of an age-sensitive IAG project. It concludes that demand for IAG from older workers needs to be stimulated and that the role of IAG in helping older adults to work and learn deserves greater recognition.*

### Introduction

As other articles in this section have argued, extending working lives is a key current policy focus in the UK. The recent report by the Pensions Commission (2005) – the ‘Turner Report’ – recommended increasing the State Pension Age (SPA) to 66 in 2030, 67 in 2040 and 68 in 2050. The 2006 age discrimination legislation in Britain is another major development which it is hoped will extend working lives. However, if work is to be rewarding, action will be required on a number of fronts: on financial incentives and in the attitudes of employers and workers themselves (OECD, 2006: 81).

A related, though neglected, issue, and one on which social policy can have an impact, is the potential role of career counselling and training advice in supporting the extension of working lives. This role has been recognised by the Department for Work and Pensions in the Green Paper *A New Deal for Welfare: Empowering people to work*, which states its aim of ‘providing people with support and information to enable them to make sensible choices about when and how to retire, based on their own circumstances and aspirations’ (2006: 69). At present, take-up of intensive back-to-work support is voluntary for people aged 50–59. The government has announced a proposal to improve the chances of older jobseekers finding work sooner by piloting a system to ensure that more take advantage of the face-to-face guidance sessions available to people approaching 50 or over 50, which offer tailored and relevant information on working, training and planning for retirement (see also Pendleton, this issue). It is evident that IAG provision for older workers will become more important, and therefore reaching improved understanding of what older workers want from such services is vital.

Changes in the labour market have challenged the relevance of career transition as a one-off event at an early stage of adulthood. Now there is a broader understanding of how transitions into education, training, employment and retirement are more prolonged (Young and Collin, 2000). Information, Advice and Guidance (IAG) services have a role

in helping people negotiate this new environment by supporting adults in identifying and overcoming barriers to learning and work. Encouraging later retirement will require facilitating labour market mobility among older workers (OECD, 2006: 123). Indeed, the Department for Education and Employment's (DfEE) framework for post-16 learning, *Learning to Succeed* (1999), indicated that there was a potential demand for these services because individuals will need help to navigate the labour market as they change jobs more often than in previous times (Sims *et al.*, 2000: 1).

There exists a literature on adult IAG services in general (Dench and Regan, 2000; Killeen, 2000; Sims *et al.*, 2000; Irving and Slater, 2002; ASW Consulting *et al.*, 2003; Milburn Trinnaman La Court (mtl), 2003; Skills and Education Network, 2004). However, this article reviews research on the specific learning and guidance needs of older workers, in particular so-called 'grey literature', of which the most comprehensive are *Challenging Age* (Department for Education and Skills, 2003) and *Am I Still Needed?* (Ford, 2005). It also outlines the IAG model of an age-sensitive e-guidance project called Tick Tock.

Some adult IAG services in England are provided by private practitioners. However this review looks at state-funded provision by, for example, colleges and training providers to their students; by Learndirect, a national telephone careers advice service; by Jobcentre Plus; by Union Learning Representatives; and by IAG partnerships, which are funded through local Learning and Skills Councils (LSC) and are made up of various organisations helping adults to find suitable education, training or work.

The Skills and Education Network (2004) define information, advice and guidance according to how personalised the service is:

- 'Information' is the provision of information on learning and work conveyed through printed, audio-visual and electronic materials and verbally. It does not involve discussion on the relative merits of what is available.
- 'Advice' involves more interaction with service users, usually on a one-to-one basis. It may involve explaining how to access and use information or referring someone elsewhere for guidance.
- 'Guidance' is more in-depth activity, conducted by a trained adviser. It helps service users explore a range of options, relate information to their own needs and circumstances, and make decisions about learning and work.

However the term 'career guidance' is frequently misunderstood by the general public and policymakers (Ford, 2005: 6). There is commonly an assumption that IAG services are for younger people: older people may think that they do not need guidance, they are too old to learn or be unaware that it is available to them. Yet there is no upper age limit to 'older workers'; there are people above the SPA who are in paid work and keen to learn. Nevertheless, people who use guidance are in general much younger than the workforce as a whole (e.g. through Connexions), which suggests effort needs to be put into drawing older people into IAG services (Killeen, 2000: 26).

IAG can be for learning and training, career development or self-employment, leisure classes for pleasure or social interaction, for active retirement or for unpaid opportunities like volunteering. It is more common among older people than younger people to choose to learn something purely for pleasure or for social reasons (Learning and Skills Council for Kent and Medway *et al.*, n.d.: 53). However, this review focuses on employment and training for work, as services are likely to become more work focused in the future. Although some clients have IAG brought to them as part of a programme of learning,

training or employment services in connection with a benefit claim, this review also focuses on clients who access specialist IAG services of their own initiative.

A central theme is the diversity of older workers, which IAG services need to recognise. The next section addresses why IAG services should be targeted at older people. The following section reviews the evidence on how best to provide services which meet their specific needs. Finally, Tick Tock, an example of an innovative IAG project for older workers is described.

### **The importance of IAG services for older workers**

One of the key national priorities for IAG partnerships is to ensure that all members of the community have access to IAG services free of charge, with particular attention given to the needs of disadvantaged clients (Irving and Slater, 2002: 6). However, a survey of IAG partnerships found that older clients were regarded as a very low priority, although overlapping groups such as the unemployed, those with outdated skills and labour market returners were given higher priority (Irving and Slater, 2002: 12). Yet arguably, older people have greater IAG needs than younger adults. This section addresses the role of IAG services in helping people to enhance their employability.

In general, older people have lower skills levels, are less likely to learn and are less likely to be in employment. Although unemployment rates among the age 50-SPA group are low (2.3 per cent by the ILO definition), 27.0 per cent are inactive 'hidden unemployed', many of whom are experienced and would like to work (Department for Education and Skills, 2003: 5; Department for Work and Pensions, 2006: 8–9). For instance, 14.2 per cent of people aged 50 to SPA are in receipt of Incapacity Benefits<sup>1</sup> (Department for Work and Pensions, 2006: 10). With current government ambitions to move Incapacity Benefit claimants into work, providing age appropriate services will be ever-more important.

Although a substantial share of the inactive will have made a deliberate decision to retire early, two-thirds do not do so voluntarily (Age Positive, 2001: 1). The reasons for inactivity include lack of qualifications (Learning and Skills Council for Kent and Medway, 2003: 12–13). One report showed that 21.4 per cent of those aged 50 to SPA have no qualifications compared with 10.4 per cent of 25–49 year olds (Department for Work and Pensions, 2006: 11). People aged over 55 are less likely to participate in training (Newton *et al.*, 2005: 32). Yet those potentially in the labour market need to keep their skills up to date if they are to be able to meet the needs of local employers and gain stable employment (Learning and Skills Council for Kent and Medway, 2003: 24). In a review of ageing and employment policies in 21 countries the OECD concluded: 'In all of the review countries, improving training opportunities and the take-up of these opportunities have been identified as a key area for strengthening the employability of older workers' (2006: 73). IAG services have a key role in providing encouragement to pursue learning and training.

Over confidence or low confidence can act as barriers to accessing learning or work. Alternatively, older workers may perceive themselves to be discriminated against purely on the basis of their age, and believe little can be done to enhance career progression. They are less likely to be interested in learning new skills which they perceive will not make any difference to either entering or staying in work (Learning and Skills Council for Kent and Medway *et al.*, n.d.: 65; Phillipson and Smith, 2005: 59). Older workers with

few qualifications may be satisfied if they are able to remain in, or be offered, work at all and are less aspirational in their attitudes than those who hold degree-level qualifications. As the LSC has found of older people: 'Their demand for learning is therefore weak but needs to be stimulated' (Learning and Skills Council for Kent and Medway, 2003: 14).

Some older workers welcome the opportunity to take a new direction (Department for Education and Skills, 2003: 5). In particular, women are more likely than men to come forward for training opportunities in order to change direction, possibly because women are more free than men to make this choice if their partners are still bringing in a salary (Learning and Skills Council for Kent and Medway *et al.*, n.d.: 54). Older workers may welcome the opportunity to re-train or start a new career such as running a business (Medway Learning Partnership, 2001), because older people may not want to continue in sectors such as manufacturing and construction as they get older (Learning and Skills Council for Kent and Medway, 2003: 12–13). Many older people say they enjoy working even if they do not want to return to their previous occupations or lifestyles (Department for Education and Skills, 2003: 6, see McNair, this issue). IAG services can foster job mobility in the face of structural change and to help people identify suitable alternative occupations (OECD, 2006: 76). However, for many people living in deprived areas learning appears to hold little relevance for career plans. The context of poverty erodes hope and health; acts as a barrier to jobsearch and learning and can also reinforce fear of change or taking a risk (Department for Education and Skills, 2003: 6). This compounds the problem, mentioned above, that people over 50 in general are less likely to value learning. Specific ways of reaching this group are needed.

In addition to the benefits to older people themselves, developing the skills of older workers is seen as crucial to securing economic growth and raising productivity in the context of demographic change (Department of Trade and Industry, 1995; Department for Education and Skills, 2003: 5). Economic inactivity of older people compounds labour shortages in some areas, particularly since there is a fall in the numbers of young people leaving school. Harnessing the skills of older workers, and enabling them to re-enter or stay in the labour market can therefore make a significant contribution to economic growth. Retaining older people in the workforce depends on them being able to update their skills. A recent survey found that IAG appears to be key stimulants for people to re-engage in learning (Milburn Trinnaman La Court (mtl), 2003). Employers also have a stake. Skill development and updating while in employment can help ensure retention to the benefit not only of workers, but of employers too (Department for Education and Skills, 2003: 8). It is also argued that older people who are involved in learning and work benefit in terms of their own health and well-being, their sense of achievement and they lead a more active social life and become involved in their community (Dench and Regan, 2000).

Employers are sometimes the first people that employees turn to when they seek advice on learning. Even when employees pay for their own learning, they may ask their employer advice about how it might enhance their career aspirations. Yet older workers are often reluctant to discuss their learning needs with their employer for fear that their skills and qualifications deficits might be exposed. This means that often older workers do not seek or get independent support or guidance to identify learning and career goals in the workplace, and skill deficits can be overlooked. IAG services can fulfil that role.

*Learning to Succeed* indicated that there was a latent demand for these services as one in five adults know little about the type of learning opportunities that are available locally

(Sims *et al.*, 2000: 1). In addition, older workers may mistakenly believe that they cannot afford to undertake learning and training. For example the LSC for Kent and Medway reported that cost and payment structures for further education and training courses were not generally understood (Learning and Skills Council for Kent and Medway *et al.*, n.d.: 61). IAG services can provide that information. IAG providers also have an important role because for many people aged 50+ there are few, if any, alternative means of accessing information about retraining or new areas of employment, other than through Jobcentre Plus welfare-to-work programmes (New Deal 50plus) (Department for Education and Skills, 2003: 8). Unfortunately there is a six-month qualifying period for eligibility for Jobcentre Plus programmes, when claimants may need or want advice sooner.

### Providing IAG services to older workers

Older workers have often developed their skills and knowledge experientially, This means that their learning is not accredited, and, consequently under-recognised or under-utilised. For many older people seeking work it is therefore vital to receive effective IAG services in order to profile their experience and strengths by skilled assessment of occupational and transferable skills, aptitudes and experience, previously unrealised potential and preferred learning styles (Department for Education and Skills, 2003: 8). Older adults tend to appreciate the use of psychometric assessment instruments (Department for Education and Skills, 2003: 16). However their opinions of computer-assisted guidance are more mixed (cf. Learning and Skills Council for Kent and Medway *et al.*, n.d.: 97). For those without formal qualifications, diagnostic assessment tools offered by IAG services can help build up an objective picture of aptitudes and abilities which, added to their existing work history, can provide the source material for identifying any training and other learning needs and also for producing a dynamic CV. They may then want skilled help in relating their individual skills, aptitudes and experience to the changing labour market and needs of the local community.

IAG services ideally should recognise the diverse work pattern preferences of older people. Attention is needed to the changing nature of people's skills interests and values as they grow older, and how these match the opportunities in the labour market (Department for Education and Skills, 2003: 10). In the UK, the peak age for caring is 50–59, and more than 20 per cent of people aged 50–59 are providing some unpaid care (Carers UK, 2005). The so-called 'sandwich' or 'pivot' generation in their fifties and sixties is combining paid work with caregiving for a spouse, adult children living at home or grandchildren (Mooney *et al.*, 2002: 1). Therefore older adults need information about local employers who offer the kind of workplace they want. For example flexi and part-time working, telecommuting and self-employment may appeal to workers of all ages, but can have particular appeal to those older workers, especially women, who face conflicting priorities between desire to continue paid work and their family lives (Department for Education and Skills, 2003: 5; Loretto *et al.*, 2005).

When it comes to choices about extending working life, such as whether to develop their career or re-train, individuals may face difficult choices involving factors such as relationships, health and finance. The potential need for guidance is evident. For example, the rising incidence of work stress may increase the number of older clients with mental health problems who do not necessarily want to retire from paid work. On the other hand, a period out of work may also have taken its toll on a client's health. These kind

of complex and multiple barriers which provide the context for job change need to be addressed through an holistic approach. Therefore learning and work guidance with older people should ideally include referrals, where appropriate, to organisations such as health services.

Financial and pension planning advice is valued by older workers. They are particularly concerned with implications of taking short-term jobs or working a few hours a week. They want expert advice on issues such as financial advantages that may result from continuing in work and how to avoid losing social security benefits. In Britain, rules restrict receipt of a pension at the same time as a salary from an employer. Only from April 2006 could workers transfer to part-time work while drawing a percentage of their pension from the same company. As the Department for Work and Pensions has recognised, people need trustworthy advice about these confusing policy changes (Department for Work and Pensions, 2004).

Because employers can have negative perceptions of older workers, guidance practitioners with detailed and expert knowledge of local labour market and who are able to influence the attitudes of local employers in favour of employing older adults are of value (Department for Education and Skills, 2003: 8). Older workers do not simply want access to training and career development opportunities, but to opportunities that can provide them with the specific skills required by local employers. Job-seekers need proactive advocacy with employers about the benefits of employing older workers. Developing actions aimed at reducing age discrimination in employment practices, liaising with trades unions and encouraging better age management practice and raising businesses' awareness of the potential of older workers are important roles of IAG services. IAG services should also be familiar with local employers with a strong focus on occupational health to enable people to work for longer.

For many older workers who have been made redundant, or for those who wish to make mid-life career changes, modern recruitment practices can be a mystery. It may have been many years since they applied for a job, wrote a CV or attended an interview. Many also need help with techniques and approaches that can help them overcome age stereotyping and hidden or overt discrimination (Department for Education and Skills, 2003: 8). This includes advice on effective methods of managing 'the age question', how to dress for interviews, and selling themselves on a CV and at interview. They need coaching in personal presentation, writing CVs, interview techniques, jobsearch and self-advocacy. These are skills that can be taught through workshops based on a profile built up at the assessment stage.

The expertise of the staff and the 'personal touch' is also important to building a sound working alliance between practitioner and client (Warwick Institute for Employment Research, 2005: 3). Personally relevant expert advice and guidance that enables older people to relate the information to their own circumstances is valued (Department for Education and Skills, 2003: 8). Staff from receptionists upwards should understand and empathise with older clients, be positive, but realistic. The IAG services themselves should demonstrate total commitment to equal opportunities and age diverse working practices. Many older clients need reassurance that they are not too old to work and learn and are reassured by a mix of ages on reception and other frontline positions (Department for Education and Skills, 2003: 10). Simply being 'given time' to discuss real concerns about learning and work and for reflection and discussion is valued (Warwick Institute for Employment Research, 2005: 3). As Ford puts it, 'time to tell and make sense of one's

personal story and plan ahead' (2006: 4). Put another way, guidance workers who have highly developed mentoring skills and who are genuinely client-centred are appreciated, who listen, motivate and encourage, who have the ability to act as 'sounding boards' and 'sources of ideas' (Department for Education and Skills, 2003: 8–9).

Coherence is achieved most often when clients have an on-going relationship with an adviser and staff continuity is important to achieving this level of service. Follow up of progress also shows that agencies genuinely care, and increases the likelihood of a successful transition to employment (Newton *et al.*, 2005: 4). Some career guidance practitioners do not have the breadth of knowledge necessary to advise on lifelong learning (OECD, 2003: 17). There is a need, therefore, for IAG professionals with specialist expertise in supporting older workers to make career and learning decisions. Advisors should also keep up-to-date with local and national policy developments affecting older workers.

Those older people who have been out of work for some time, may appreciate opportunities for work trials, work sampling and work experience so that they can act as their own ambassadors, try out their skills, find out about unfamiliar occupations and prove themselves to employers (Department for Education and Skills, 2003: 8; Ford, 2006: 4). Work sampling and job trial opportunities enable individuals to learn about new jobs and demonstrate their skills. Opportunities to form peer group support networks are also welcomed (Department for Education and Skills, 2003: 8). Peer support can prove invaluable in helping individuals to regain confidence and motivation, stay focused on their career goals; re-establish direction, implement action plans, obtain work, progress in learning and achieve personal objectives. Another solution is to involve older people themselves as IAG mentors. Union Learning Representatives, a joint government and Trades Union Congress (TUC) initiative, is one way to target older men in particular, who may find it easiest to relate to union officials in the workplace (OECD, 2003: 11).

The key element of providing specialist guidance for older workers is the need for differentiated support. The needs of those who want to supplement low incomes will be different from those for whom mental stimulation and social interaction are as important as extra income. This is a diverse group in terms of labour market prospects (OECD, 2006: 135). From a life-course perspective, the needs of someone at 52 will be different from those of someone aged 62 or 70. Attitudes to work vary at different points in the increasingly extended transition to retirement (Phillipson and Smith, 2005: 54). Therefore the heterogeneity of older clients needs to be recognised. For example, in rural areas there may be a greater need to develop user access to self-help (Skills and Education Network, 2004). As a further example, the reasons for inactivity vary by gender, with men more likely to face the barrier of ill-health and women more commonly coping with home responsibilities (Loretto *et al.*, 2005: 41).

There is potential for increasing the profile of adult guidance and the impact that could be achieved if more adults sought a change of direction used the services available. In order for clients to access specialist IAG services they both have to have identified that they have a need for IAG support and know where to seek services to address those needs. Yet in general terms, potential clients have been shown to have a very limited awareness and understanding of the full range of IAG services, which imposes a major constraint on them being able to access the most appropriate service at the optimal moment: many adults, other than those in the benefits system, have 'stumbled across' their provider (ASW Consulting *et al.*, 2003: 5). Research shows that services are not understood as being part

of a bigger, coherent picture nor do adults have a sense of entitlement to IAG (ASW Consulting *et al.*, 2003: 9). This suggests that more needs to be done to promote local adult guidance facilities and to convince potential clients of their benefits. Marketing should be targeted at older people to ensure that they know IAG provision is for them as well as for school leavers. Active outreach is essential to reach older age groups who may not otherwise recognise the value of IAG, those who might have written themselves off as 'too old' for learning and the 'hidden unemployed' (Department for Education and Skills, 2003: 14).

### **Tick Tock: an e-guidance project**

An issue for IAG services in the South East is the number of people commuting outside of the area to work. Many of these commuters have high level skills that could contribute to the local knowledge economy. Moreover, a significant number of older commuters grow tired of the drudge of commuting and actively seek local work. Their interests and values changes as they grow older. However, they often face barriers to re-entering the local job market because of their age, and the majority are forced to take lower-skilled and lower-paid work. People with higher qualifications are more likely to stay in work, although they are still disadvantaged, irrespective of qualifications (Ford, 2005: 13; Third Age Employment Network, 2005). IAG support could help them find work which matches the demands of the labour market yet is more appropriate to their qualifications. In this respect the Tick Tock project is unusual: most services are aimed at clients who do not have level 2 qualifications.

Tick Tock is a southeast-wide project aimed at supporting older workers. One aspect of the project is improved IAG services, including the delivery of virtual guidance via a dedicated website. The possibilities of e-guidance have been highlighted by Ford (2005: 43). This project provides an innovative virtual guidance and assessment website and e-learning platform for older workers, in particular those commuting into the London labour market. It can be accessed through on-line centres, the workplace and from home PCs, which addresses older workers' problem of lack of time to attend IAG services during the working day. Increasing numbers of the 50+ age group have access to the internet, and it provides another channel through which to provide information, making IAG services more accessible. Users are able to join discussion forums and access peer mentors. There is also specialist advice available on a bulletin board. It includes links to recruitment agencies and age-friendly employers, learning and training providers as well as financial advisers and pensions specialists. The website includes on-line tools to help individuals assess their aptitudes, skills levels and learning styles; profiles to record their experience, qualifications, prior learning, work history; labour market intelligence; learning materials to help individuals identify alternative work patterns and suitable occupations; guidance to help individuals produce effective CVs through an online CV Clinic; and case studies of effective techniques that older workers have successfully used.

### **Conclusion**

In summary, the benefits of IAG for older people are considerable. Many older people want to work and develop their abilities in later life, but have difficulty in doing so. In response, more needs to be done to promote local IAG services and to convince potential



clients of its benefits. IAG provision needs to be properly targeted, not just on older adults generally, but recognising the diversity of older clients' needs and motivations. IAG services need to pay attention to the changing nature of people's skills, interests and values as they grow older, and how these match the demands of the labour market. Although it might be argued that targeting could reinforce negative perceptions of older workers (OECD, 2006: 124), the role of high-quality advice and guidance in helping older adults to work and learn deserves greater recognition, and services for 16–18 year olds should not be prioritised at the expense of provision for the over 50s.

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## Note

1 Incapacity Benefit or Severe Disablement Allowance.

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