

Age at Work:

A National Lottery Community Fund funded 5 year programme across 3 Nations

A Social Return on Investment Analysis



Conducted by:



October 2024

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The Age at Work programme in Northern Ireland, Scotland and Wales - A Social Return on Investment Analysis

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Chief Executive Officer
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Executive Summary

This research was commissioned by the Age at Work programme, run in Northern Ireland, Scotland and Wales over five years, supported by the National Lottery Community Fund, and conducted by Bean Research. It focuses on how the programme created social value through supporting older workers and Employers in each nation, and what its social return on investment is.

This project was conducted through quantitative and qualitative research, using the Social Value International (SVI) Principles as a guide to make decisions and to consider the broader definition of value. The specific focus of the social valuation was on the Older Workers who participated in the programme, and Employers in the three nations participating. Age at Work Older Workers were actively involved in the evaluation process, so their experiences have been respected, and their voices have influenced the process.

This research project and report show that Age at Work creates significant social value to society through its work with Older Workers, generating outcomes based on the development of financial capability, employability and vocational skills, a more positive mindset, and employment opportunities.

Acknowledgements

Thank you to all the Older Workers, Employers and partners involved in Age at Work programme who shared their experiences, insights, and personal journeys with the research team. It is their experience, and the Age at Work's team's dedication to these individual successes, which has generated such value for society.

The 'Age at Work team' hides the expertise and experience of six teams behind the performance based at Age NI, Age Scotland, Age Wales, BITC NI, BITC Scotland and BITC Wales.

The analysis, primary research, value map and report that forms the SROI report within here was conducted and authored by Charlotte Turner. The researcher is a Level 3 Social Value International Advanced Practitioner.

Thank you also to Social Value International for their guidance, driving principles and assurance process.

Introduction

This report looks specifically at Social Return on Investment (SROI), to understand the social value of the Age at Work programme, which should be seen as just part of research and analysis of the Age at Work programme.

SROI is a framework for measuring and valuing change and impact in ways that relate to and are of significance for the people or organisations that experience or contribute to this impact.¹ This method of analysis provides an assessment of whether value is being created by measuring social, environmental and economic outcomes and uses monetary values to represent them.²

This report focuses on the social value created by Age at Work through its two initiatives with Older Workers - Mid-Career Reviews and the Still Ready for Work programme; and the work with Employers to create more age-inclusive workplaces across the three nations. The scope of the work was framed in terms of being a distinct piece of work, seeking to understand the social value created by Age at Work for the people and employers affected and for whom the programme was set up, and to understand how the programme could further develop on its legacy.

Now at its end, the five-year Age at Work programme has been delivered by Age NI in partnership with Business in the Community NI, and counterparts in Scotland and Wales, funded with £2,244,944 by the National Lottery Community Fund. This programme has directly addressed the challenges and opportunities for both older people and employers in an aging society.

In order to better understand the value of the Age at Work programme, Bean Research, was commissioned to lead a project to assess its social impact from early on in the five year programme. This report draws from research undertaken throughout the last five years, has been conducted in accordance with the eight Principles of Social Value and the Social Return of Investment (SROI) framework published by the Cabinet Office of the UK Government³, and is externally assessed by Social Value International (SVI).

Building an account of social value is a story about the changes experienced by people, through qualitative, quantitative, and comparative information. The type of social value analysis carried out in this report is a Social Return on Investment (SROI), which calculates and communicates the social value created by Age at Work in financial terms, using the common nominator of money while adhering to the Principles illustrated in

¹ Nicholls, A., Nicholls, J. and Paton, R., 2015. Measuring social impact. *Social finance*, pp.253-281.

² Jones et al. (2016)

³ Social Value UK (2012) *Resources Library: A Guide to Social Return on Investment 2012*

Figure 1 below. Further details on Social Value International can be found at www.socialvalueint.org

The Principles of Social Value

An account of social value is a story about the changes experienced by people, based on qualitative, quantitative, and comparative information.

By implementing the Principles of Social Value within this work, it has been possible to create a consistent and credible account for the value being created or destroyed. The principles provide basic building blocks for decision-making and reporting, as accepted social accounting principles.

1. **Involve Stakeholders:** Inform what gets measured and how this is measured and valued in an account of social value by involving all stakeholders. Ensuring the voice of the beneficiaries is present.
2. **Understand what changes:** Articulate how change is created and evaluate this through evidence gathered, recognising positive and negative changes as well as those that are intended and unintended.
3. **Value The Things That Matter:** Making decisions about allocating resources between different options to recognise the values of stakeholders. Value refers to the relative importance of different outcomes. One method is to use financial proxies, which means that the value can be compared with the cost of the activity.
4. **Only Include What is Material:** Understanding that there could be many outcomes with information and evidence to report, but including only the most relevant to give a true and fair picture of the impact for stakeholders to draw reasonable conclusions
5. **Do Not Overclaim:** Only claim the value that activities are responsible for creating by referencing baselines, trends and benchmarks to help assess the extent to which a change is caused by the activity, as opposed to other factors.
6. **Be Transparent:** Demonstration that each decision is explained and documented concerning; Stakeholders, outcomes, indicators and benchmarks, and the sources and methods of information collection. The analysis will be more credible when considered accurate and honest.
7. **Verify the Result:** Any account of value involves judgment and some subjectivity. Therefore an appropriate independent assurance is required to help stakeholders assess access validity.
8. **Be Responsive:** Optimising Social Value by delivering on societally agreed goals, such as the UN SDG, as far and as fast as possible, through timely decision-making and supported by appropriate accounting and reporting.



Fig 1. SVI Principles, 2024

About Age at Work

The Age at Work programme, funded by the National Lottery Community Fund for five years, was launched in May 2019. It has been delivered by Age NI in partnership with Business in the Community NI and counterparts in Scotland and Wales. This programme directly addresses the challenges and opportunities for both older people and employers in an aging society across three nations and six teams.

With a greater number of workers over 60 years of age in the workforce, it is vitally important that Older Workers are supported to remain or return to work, and also that mature Older Workers are supported to seek and stay in employment to help them have enough income, stay connected, and have a fuller working life.

Age at Work seeks to:

- Support Older Workers and mature Older Workers to **seek and stay in employment**, helping them to earn sufficient income, stay connected and have a fuller working life.
- **Raise awareness** of the impact of an **ageing workforce** and the need for an age-inclusive agenda in government, business, and wider society.
- Encourage and **support businesses to be more age-inclusive** in recruiting, retaining, and retraining Older Workers.

Bean Research started the evaluation of the Age at Work Programme in 2020, part way through the first year of the initiative. The evaluation began with a thorough review of the programme elements, existing surveys and data collection methodologies. By the end of 2020, a suite of surveys had been implemented, and output data collection started to allow for analysis and reporting both quarterly and annually to the Age at Work Team and their funders, the National Lottery.

It should be noted that for the first two years, the Age at Work programme was operating in the Covid-19 environment which exacerbated existing, as well as adding new issues, for older people while significantly impacting the delivery of the programme. The programme was adapted and by Year 4, was running in the post-Covid-19 hybrid workplace environment but also has faced challenges of the growing cost of living crisis and return to work drive that has demanded the attention and time of many employers and HR professionals.

Scope of this research and report

This section outlines the scope of the organisation, our research, as well as the research methodology and the scope of the evaluative Social Return on Investment Analysis for this report.

The Research Process

Bean Research was commissioned in 2020 to explore the social value of Age at Work delivery, using the principles and practice of Social Return on Investment. This work was conducted across a number of phases detailed below:

1. Reviewed the overall context, aim and objects in which Age at Work operates, using desktop research to frame a landscape review.
2. Worked with Age at Work nations & regions – conducting a workshop with steering team in early 2020.
3. Conducted qualitative research among stakeholders to understand potential outcomes from the perspective of Age at Work stakeholders. (conducted in late 2020).
4. Developed a draft Theory of Change bringing together the programmes to test the projected difference made collectively and to focus the researcher across the different programmes Age at Work delivers.
5. Conducted quantitative research with participants throughout 2020-2024 to capture the data about stakeholders and establish quantitative measurement of outcomes. Quarterly data was shared with the six delivery teams.
6. Adjusted research to reflect changes in COVID-19 (more online) and updated landscape review post-COVID-19 to reflect the impact on Older Workers of the pandemic.
7. Continued the research, quarterly reporting to the team to feed into the development of programme.
8. Conducted in-depth interview with older people affected by the programmes, and employers – stakeholders identified by researcher to capture the stakeholders' weighting and assumptions, attribution and drop-off, and priority of values. This phase was conducted between September 2023 and April 2024.
9. Assigned weightings and values to calculate the Social Value and complete this report.
10. Verified and tested with stakeholders in June and July 2024.

The Scope of the Social Return on Investment Analysis

Age at Work commissioned the project, outlining the need to establish the impact of the programme, and its social value, through an independent research consultancy throughout the course of the programme, as well as conducting a Social Return on Investment analysis, at the end of its funding from the National Lottery Community Fund.

The scope of the work was framed in terms of seeking to understand the social value created by Age at Work for the people and employers immediately affected by the programme. Expanding the scope to focus on stakeholders beyond the people who are intended to primarily and directly benefit from Age at Work's services is not feasible for this research study due to resource constraints and the need for a more focused analysis. Therefore, there is a potential risk of material outcomes being excluded.

It was a discrete piece of consultancy with a limited budget and hence was driven by understanding social value for primary beneficiaries—to that end, wider stakeholder groups such as government, commissioning bodies, and families, friends and partners of Older Workers are not in scope (and hence not material). These are reviewed as part of the stakeholder mapping process to inform the engagement with the Older Workers and to be able to understand the wider influences.

Age at Work was keen to seek independent assurance of the report. The researcher adhered closely to the principles and standards developed by Social Value International in their overall approach and sought Social Value UK assurance.

Principle 8 'Be Responsive' has been introduced since the research on this project commenced. However, it should be noted that this was a guiding principle used throughout the research. The results of the ongoing questionnaires with Older Workers, and trackers of progress with Employers was shared quarterly by Bean Research with the six partners involved in the project throughout (from June 2020 to August 2024), feeding into development of the programme, with the learning used by the funder, The National Lottery Community Fund, to understand learnings from the multi-partner programme to feed into other programme funding.

This analysis evaluates the Age at Work programme delivery from 2019 to 2024.

The Context

The Challenge – older people

There are currently 10.9 million people over 50 in work, equivalent to one-third of the workforce⁴, and with an ageing population⁵ and the cost-of-living crisis this will only continue to grow throughout the rest of the decade and into the 2030s.

Prior to the Covid-19 pandemic, employment among Older Workers was at its highest since the Labour Force Survey began collecting such data in 1975, with 72.4% of people between the ages of 50-64 in the workforce at the end of 2019.⁶

In the early stages of the pandemic, Age at Work predicted that that number would decrease, and this has now come to pass. The Resolution Foundation confirmed that Covid disproportionately impacted older and younger workers, creating a “U-shaped” employment shock.⁷ By the start of 2023, the proportion had fallen to 70%.⁸

In February 2022, almost two years after the initial lockdown and the subsequent furloughs and layoffs, 63% of adults aged 50 - 70 who were economically inactive reported leaving work sooner than expected.⁹ While Older Workers over 60 were most likely to cite retirement (33%), workers in their 50s cited stress (19%). Amongst over 50s, 17% agreed they had not felt supported in their job before exiting the workforce, and 11% said that they had left the workforce due to mental health reasons.

Regardless of the reason for leaving the workforce, the data shows that the financial implications will likely be longstanding. The average employee who loses or leaves their job at 55 has a private pension savings of approximately £32,812, which is 34% less than someone who retires at 68.¹⁰ Those who left work after the pandemic are also more likely to report reduced savings (51% compared with 33%).

Now, the number of people over the age of 50 seeking employment is on the rise, and personal finance is a crucial factor. 12% said that they were driven by the rising cost of living, and 8% by the desire to increase their pensions. While mental health and stress were factors of over 50s leaving the workforce, they is also a driver for re-entering, with 36% of those seeking work citing the mental and social health benefits. Notably, 47% stated a combination of all three as the reason for returning to work.¹¹

With a greater number of workers who are over 50 years old in the workforce, or eager to return to work, it is vitally important that they are supported adequately. Helping them to seek and stay in employment will help this group to have enough income, stay connected and have a fuller working life.

Supporting Older Workers to stay in or return to work means developing an employment landscape that enables them to thrive. Of those currently in a paid job, nearly half (48%) said that flexible working hours are important in their main job, while 41% welcomed the ability to work from home. This is echoed amongst those who would consider returning to work, a third (32%) would be looking for flexible working hours, while 12% would welcome the ability to work from home. One in 10 (10%) agreed that paid work would need to fit around their caring responsibilities.¹²

Shifting the perception of Older Workers amongst employers is also critical to ensuring they have access to opportunities and support to remain employed. Despite three in four employers (76%) viewing Older Workers' experience as crucial to their organisation's success and more than half (54%) feel that an age-inclusive workforce would increase productivity,¹³ these beliefs are not backed up with action.

The majority of Older Workers are open to training or reskilling, with 92% prepared to take a salary cut to learn a new skill, but only 35% of employers are prepared to retrain staff who are in their mid-50s or older.¹⁴ Two in five (39%) younger HR decision-makers also admit that they are less likely to recruit people over the age of 50⁴. A recent research paper concluded that if employers did consider age in the recruitment process, it tended to be in favour of recruiting younger workers.

Older Workers taking part in the Age at Work programme

At the start of the programme, the large majority of Older Worker participants planned to be in or return to employment. 56% stated an aim to remain in employment for the foreseeable future, 23% planned to seek new employment or a new position, and 15% wanted to return to work. 20% were looking for more flexible hours. However, 2 in 5 (42%) of the Age at Work Participants anticipated the transition to retirement soon.

The broader needs of Older Workers and the need for a multi-facilitated programme are clear. The Age at Work programme aimed to address this through its variety of courses and interventions, catering both for those who are wanting to find a new job (Still Ready for Work), as well as those planning to remain in work or prepare for retirement (Mid-Career Review). The value to businesses in supporting Older Workers is evident in that half the participants (at the end of the programme) still intend to be working in 5 years' time. 51% aim to work a further 1-5 years, 31% 5-10 years and 18% for more than 10 years.

The overriding motive for continuing or returning to work was financial, with 87% stating that the money to sustain a good quality of life was the most important factor in employment, and 63% wanted to make additional pension contributions. 48% enjoyed the social side of work and 45% have skills they want to use. Almost a third recognised that their health was better when they are employed.

⁴ Survey of 1,000 managers working in UK businesses and public services. Chartered Management Institute, 2023.

How Age at Work activities seek to address the challenges

1. Supporting Older Workers back into work

Older Workers are recruited either via online advertising or referred by a Job Centre to participate in the Still Ready for Work Programme. The journey through the programme varied by the needs of the participant. Three routes for training and support were available:

1. Online learning modules (1-hour sessions), with participants selecting how many they registered for and completed.
2. Face to Face Workshops were offered primarily at Job Centres, whether as a full morning session to cover all topics or a series of 5 one-hour drop-in sessions.
3. The Online Coffee and Job Club was introduced in Scotland during the pandemic to tackle the issues of increased social isolation and decreased confidence which had emerged as barriers to employment, exacerbated by Covid-19 lockdowns. This less formal approach included training on Still Ready for Work topics, but centred around peer-to-peer discussion, signposting to resources and one-to-one help and advice.

For all Still Ready for Work participants, there was also an option to complete a two-week job placement with an associated employer.

Those following a placement route were required to complete the Learning Modules and two additional training sessions on Customer Service and Self Confidence. Typically, after the two-week placement, candidates would complete or be offered a role. Those not employed then had the option to continue to join the Coffee and Job Club and/or access other Age at Work resources and support.

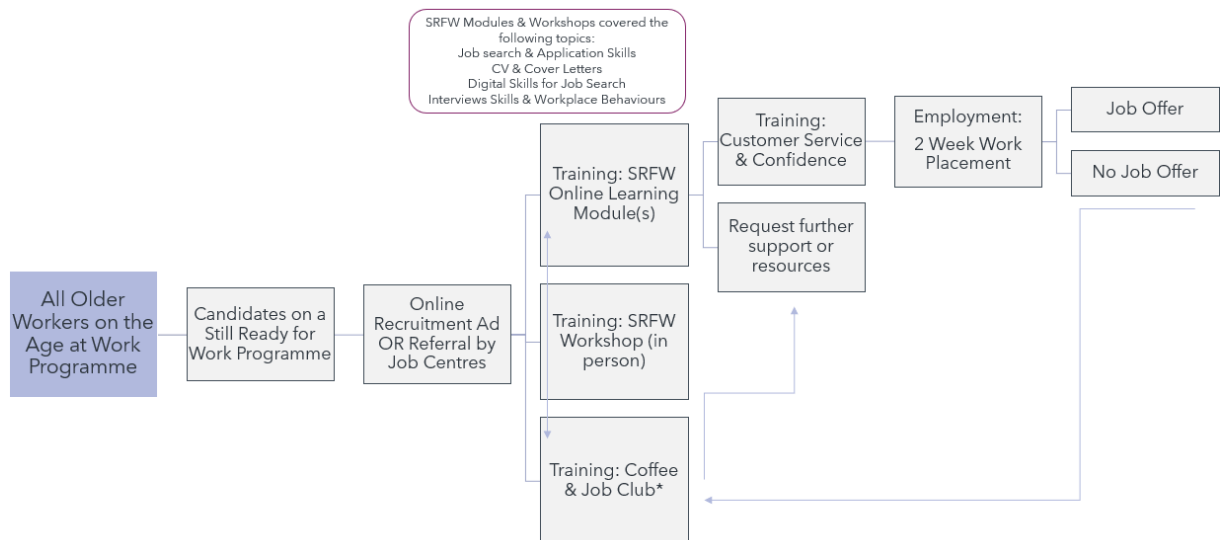


Fig2: Flow of Still Ready for Work programme.

2. Enabling Older Workers in work to accurately plan and prepare for later life.

Older Workers are recruited either via online advertising or invited by their employer to participate in the Mid Career Review or Age Academy programmes. Three different modules were available as webinars, or a bespoke combination session was prepared for an organisation. (Before the pandemic, these were delivered face to face).

Older Workers could complete 1, 2 or all 3 of the modules covering Financial Wellbeing, Health and Wellbeing and Career Support.

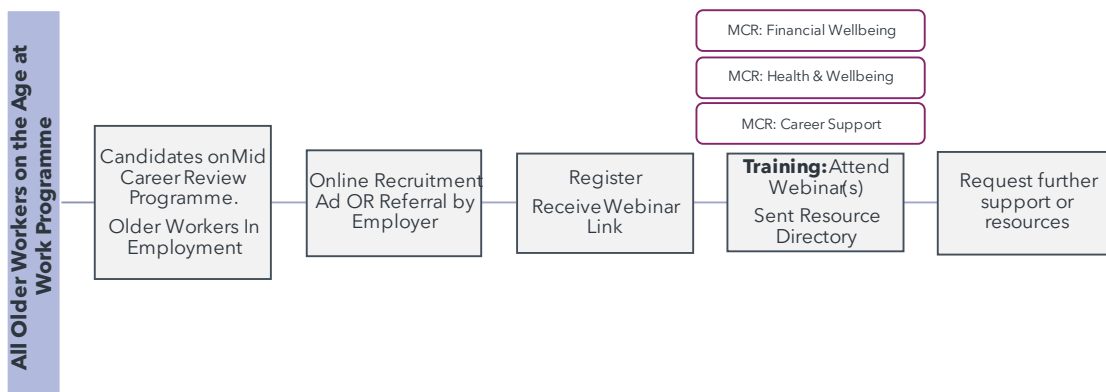


Fig 3: Flow diagram of Mid Career Review programme

Once candidates were registered, they received a link to the webinar session(s). Live webinars included discussion and opportunity for questions and all participants were then sent a directory of further relevant resources. Post completion, candidates were then also contacted with an offer of further support or resources. This was mostly through signposting additional resources on issues discussed on the session (so bespoke for each employer/ session) or an offer of additional support offered on a specific topic. During the course of the project, the need for the additional sessions was reduced as learnings from these sessions were incorporated into the core sessions.

3. Working with businesses, through multiple interventions and touchpoints to increase age inclusivity in the workplace.

Through Business in the Community (BITC) or Age Scotland connections, networking, advertising, and direct approaches, employers were recruited to the programme. The diagram below demonstrates a typical path for an employer engaged on Age at Work programme, but the journey for each organisation was bespoke for their characteristics and needs, and the offer available through each nation's partners.



Fig4: Flow of Employer offer

Stakeholders

Social Value calculation is centred on how stakeholders think and feel about an intervention and what has happened as a result, following Principle 1: Involving Stakeholders⁵, to ensure the voices of those receiving an impact are included in the research. As this research has a focused scope, the primary target groups of the study will be on the Older Workers and the businesses as the two main stakeholder groups.

The report's scope therefore focuses the analysis to the specific group of individuals and businesses who are directly targeted to benefit from the activity and does not include engagement with wider stakeholders.

It is recognised that by not expanding to include other stakeholders then some social value may not be captured. Within the stakeholder mapping, the broader stakeholder groups were identified and steps to address the above limitation are discussed in the concluding chapter of this research report.

Stakeholder Mapping Process

A stakeholder mapping process was conducted in 2020.

Six teams, three of which represent the Age federated organisation – Age Scotland, Age Wales and Age NI who are embedded in this age group and work every day with. Similarly, BITCx3 involvement know businesses and their challenges in recruitment and retention around Older Workers.

We worked with these groups in a workshop to develop an informed understanding of the stakeholders engaged in the process. The resulting map focusses on recipients of the support delivered and the purpose of the project's existence. This map was used to develop the engagement approach and as the basis of the stakeholder engagement process in the research.



⁵ <https://www.socialvalueint.org/principle-1-involve-stakeholders>

In the main, Business in the Community (BITC) provided support for age-related workplace issues. This includes mid-life career planning, health and wellbeing support (especially regarding menopause), inclusive recruitment, and support for caring responsibilities. The aim is to help members implement age-inclusive workplace policies and practices that support their ageing workforces.

BITC's Age at Work programme is delivered across Scotland, Wales and Northern Ireland in partnership with BITC Scotland, Age Cymru and Age NI, with funding from the National Lottery Community Fund.

The stakeholders identified were:

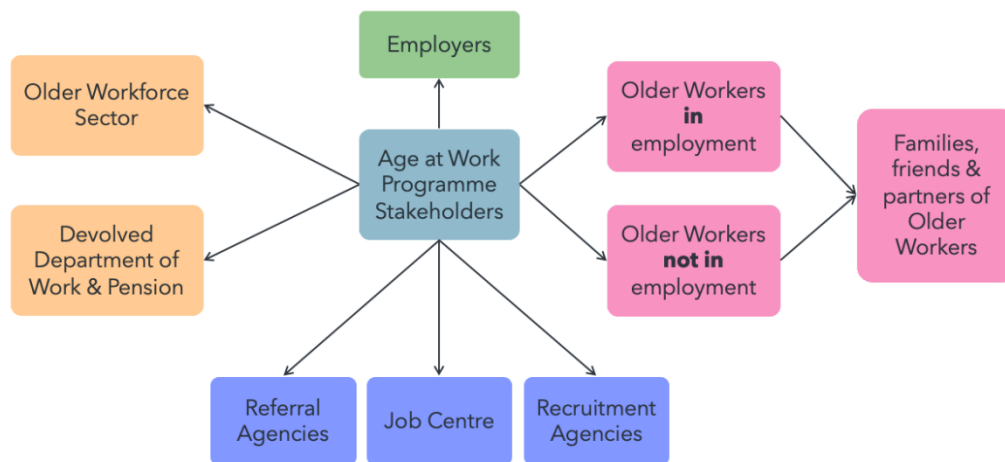


Fig. 5 Stakeholder mapping

Understanding the decisioning on Stakeholders to inform the research

The following table details the various stakeholders groups and why they were included or excluded from the research. This is not to say that Age at Work doesn't create outcomes for a variety of stakeholders. However, for this social value assessment, we have focussed on outcomes for the stakeholders directly affected by Age at Work interventions, reflecting the scope and limitations of the research project. In this decision-making process we assessed Age at Work's wider potential stakeholder groups to inform the research.

Included Stakeholder Group

Stakeholder	Stakeholder Group Definition	Considerations
Older Workers in employment	<p>Older Workers In Employment are the Older Workers who were active participants in Age at Work's Mid Career Review programmes between 2020 and 2023.</p> <p>Older Workers in this group are active in the employment market and are over 50 years old. They have either been referred to the programme by their employers or have been signposted to the courses via advertising.</p>	Older Workers are the primary focus on the research study, and the intended recipient of the interventions. For those in employment, through the MCR activity they have the most material outcomes in terms of understanding rights and resources for Older Workers, wellbeing, retirement preparedness and financial capability. This group is seeking to maximise career opportunities and workplace experiences while optimising retirement plans.
Older Workers not in employment	Older Workers Not In Employment are the Older Workers who were active participants in Age at Work's Still Ready for Work programmes between 2020 and 2023.	Older Workers are the primary focus on the research study, and the intended recipient of the interventions. For the Older Workers engaged in the Still Ready for Work programme, the most material outcomes are confidence and knowledge to enable them to remain or progress in work, change career or

	<p>Older Workers in this group are currently unemployed, or actively looking for new employment or change in career. They must be over 50 years old. They have either been referred to the programme by organisations such as the Job Centre or have been signposted to the courses via advertising.</p>	<p>for the majority, return to work. This group is seeking to re-engage in the workforce.</p>
Employers	<p>Employers are the organisations that employ Older Workers and are recipients of Age at Work services.</p>	<p>For employers, outcomes may differ depending on the touchpoints with the Age at Work Programme. Tools, reviews, advice and learning networks will direct businesses to outcomes of more age inclusive policies and procedures. Those engaging in MCR programmes for their employees will be seeking outcomes around a more supported older workforce, while those offering placements to Still Ready for Work participants will benefit from additional older work staff joining their workforce.</p>

Excluded Stakeholders

Stakeholder	Stakeholder Group Definition	Considerations
Friends, Families and Partners of Older Workers	The individuals in this stakeholder group are those with whom the Older Workers engaged in the programme have personal relationships.	<p>Candidates' families, friends, and partners were considered early on as a stakeholder group to include, in that employment and the financial and wellbeing benefits effect participants' personal relationships. However, it was felt that, within the scope and budget of this research, the outcomes would be more robust to capture from the candidate's point of view. The decision to exclude the direct involvement of the stakeholder group in this research was taken by the research team, in collaboration with Age at Work Teams, for multiple reasons:</p> <ul style="list-style-type: none"> - The variety and disparity of family and friend relationships across thousands of Older Workers and therefore the large range and type of impact on an individual to allow for consistent research. - Vastly different personal circumstances would make attribution of impact by Age at Work Programme, on Family and Friends, difficult. - The significant challenges in contacting this group due to the multiple relationships involved, and the potential sensitive nature of employment status, future plans, wellbeing and financial stability. - The probability of low response rates, and inherently biased samples, as the majority of potential respondents would likely come from those with the strongest relationships with the candidate.
Wider Society	Devolved Department of Work and Pensions & the Older Workforce Sector, have been combined and referred to for research purposes as Wider Society.	Changing policies and procedures across three devolved nations over a 5-year time period, within the shifting political and social landscapes, would be difficult to attribute to the relatively small scale interventions and budget for the Age at Work programme. While the researcher and the Age at Work teams reviewed and considered any measures of change in the Age Inclusive Landscape, the accurate measure of attributable change was deemed to be out of scope.

Referral Organisations	Job Centres, Referral Agencies and Recruitment Agencies for the purposes of the research have been considered as one group as Referral Organisations.	<p>Older Workers are referred by multiple different organisations and through different routes, depending on the nation, programme and individual relationships between delivery partners and local agencies. Relationships were varied, from longer term Job Centre contact to one off referrals by a recruitment agency onto the programme. Some referral organisations would have had longer term relationships with the Delivery Partners, but changing personal and flow of Older Worker through the organisations created inconsistency of experience across agencies and nations.</p> <p>The impact for Older Workers who were referred was deemed to be more important than any changes to the agencies who referred them and therefore, including this stakeholder groups was out of scope.</p>
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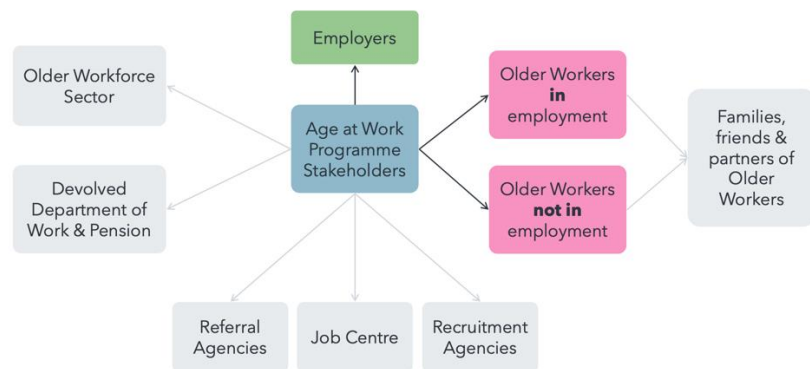


Fig. 6 Stakeholder mapping: Excluded Stakeholders (greyed out) & Included Stakeholders

Stakeholders Participation

Having identified the key stakeholders for the research, the next step was to understand the subgroups of the Older Workers. To achieve this, the researcher first needed to understand the stakeholders, their existing biases, and challenges with engaging with them, and then plan how to engage with them.

As noted above, the Older Workers as stakeholders are divided by both their work status (and as a result) the provision offered by the Age at Work team.

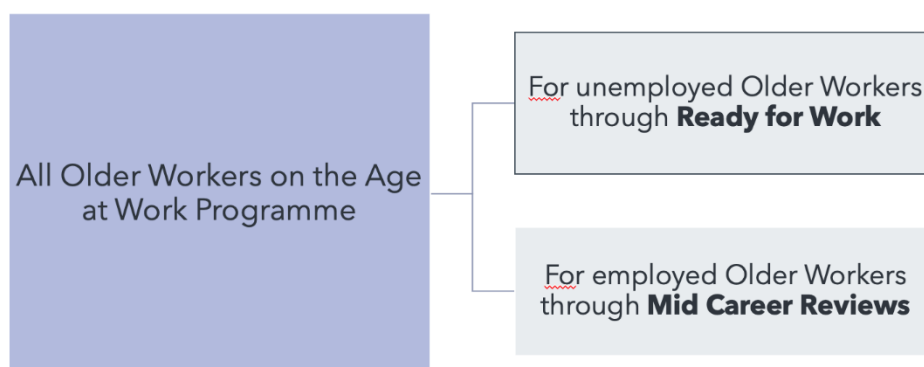


Fig 7: Two types of older workers participating in the programme.

In total, 3,105 Older Workers took part in the programme across Northern Ireland, Scotland and Wales – 2,495 Older Workers took part in Mid-Career Reviews, and 610 took part in the Still Ready for Work programme.

Of course, in addition, there are further sub-groups based on outcomes, which were then adopted through the analysis and valuation (see later in this report) – such as those who secured employment or those who increased or decreased confidence as a result of the programme.

There are three different sub-groups of Employers:

- Employers completing Age Inclusive audits and matrix
- Employers providing Mid Career Reviews
- Employers employing Older Workers who have been out of work

Their involvement followed the following process



Fig 8: Employer breakdown

Sampling and Engagement Considerations

Older Workers

To ensure a fair and representative sampling of Older Workers, the research focused on all those who took part in the programmes ensuring that all voices were heard and considered in the research no matter their outcome and would be involved in the data collection as part of the programme to have a robust data set to analyse. The method of involvement was monitoring and evaluations, in the form of pre-and post-surveys, conducted throughout the duration of the project.

All Older Workers for both SRFW and MCRs were required to complete a pre-session registration and baseline survey before participation, and all were sent a post intervention survey, immediately after their final session and all participants were asked to complete a survey 6 months after their Age at Work participation. Weekly tracking of the survey completions allowed Age at Work teams to monitor, remind and chase survey completion from each programme participant.

We have thus conducted total population sampling for the quantitative element of the Older Worker research. These were supplemented by online focus groups and case studies.

Biases Considered:

Not everyone did every session and not everyone did the same number of sessions. The Age at Work teams tracked their participants to try as far as possible to get Post surveys completed after the last session and then again 6 months after that. It is possible that those completing fewer sessions had a slightly less impactful outcome, depending on their circumstance and the content of their chosen sessions.

Delivery changed, from in person in the first year to largely online during the pandemic and then in the past year, for a few participants, a hybrid approach. From the end of year 1 to the end of programme the surveys were delivered purely online. Therefore, digital skills were not an issue at the beginning of the Age at Work Programme, with paper questionnaire and in person delivery. However, COVID delivery and impact evaluation was conducted online, which was more difficult for those Older Workers lacking digital skills.

The characteristics of the participants may have made it more likely that some completed the post surveys:

- Those out of work for a while, possibly have less access to digital resources to complete surveys.
- Less digitally savvy Older Workers may have been less able to complete post surveys.
- Those who felt they had not benefited as much as they thought they would, may have been less inclined to respond.
- Those less socially and digitally confident not have been included in the online focus group.

- Only those willing to share their identity would have been included in case studies and only the most positive outcomes would have been made into case studies.

Older Workers might have a negative impression of the programme due to the lack of successful outcomes, such as employment. Alternatively, they might exhibit an overly positive attitude or be reluctant to be honest while still on the programme. There might be a bias as they could feel grateful and indebted to the organisation and despite the best efforts on the researcher to ensure accurate responses, their responses could be more positive based on a reluctance to be honest about their employer.

Employers

Across all nations, a cumulative total of **274** Employers have engaged with the programmes over the past five years. Within this number there were a vast range of employers participating in the Age programme, in each of the three nations - small and large, public and private, B2B and B2C but employment was mostly based solely in that nation. Only those interested (or recognising the importance of) an age inclusive workplace and the value of Older Workers, would have chosen to participate.

Feedback data from Employers was captured through optional in-depth interviews, quantitative surveys, the Age at Work team’s regular interviews and updates with Employers and case studies.

For the in-depth interviews, a sample of six organisations was selected, ensuring a mix of size of organisation, and employment outcome.

Stakeholder	Research Participants	Method	Additional Information	Outputs
Employers	6 primary contacts at organisations	Depth Interviews	Case studies/ Business tracker Info from Age at Work Teams	Involvement in programme and benefits to the business
Employers	Key contacts at businesses	Business tracker – recording interventions & change at each organisation worked with	Completed after telephone check-ins by Age at Work teams.	Type and number of changes made in business

Given the survey was an optional element, these would only have been completed by the more engaged Employers. Given the time pressures and challenges in the working environment, while **all Employers involved** were asked for updates, feedback and case studies, responses were limited to those that were able.

Biases Considered: Those Employers with greater HR resources could have more time to engage with the programme itself and the evaluation process, which could bias the benefits of the Age at Work programme towards those organisations who have the most resources to tackle the issues.

Those Employers and Older Workers willing to share outcomes and case studies with the Age at Work team, are more likely to be those for whom the programme was most beneficial and were more likely to be involved and respond to the research.

Understanding Outcomes

Following the initial desktop research and consultation with Age at Work and Business in the Community, the researcher undertook stakeholder consultations to gather initial feedback.

Pre-Programme Engagement

The Age at Work programme was launched in September 2019 and ran for six months to establish its activity and running across the three nations.

An Age Advisory Group was established in September 2019 to feed into the development of the programme. The group had 14 business members from a range of sectors and became an invaluable resource, providing advice and guidance and piloting different aspects of the programme. The group consists of senior HR representatives and those working within their own respective businesses on intergenerational or diversity in the workplace. Group members are ambassadors for best practice related to the ageing agenda and are invaluable in enhancing the programme's reach and influence. They supported the researcher in developing the initial survey to capture the stakeholder's motivation for engaging in the programme.

A survey was developed to capture initial thoughts on the programme from Older Workers and Employers between September 2019 and March 2020, asking what motivated them to take part in the programme to understand the pre-intervention thoughts of the stakeholder groups. This information was collected through an online survey sent to relevant parties. As can be seen in the figure below, outcomes entered more than once appear larger.

Employers which were looking for business support were interested in supporting the workforce. Only 25% of respondents to the survey promoted age-related employment rights in their organisations, showing there is a need to engage in the programme.

Older Workers interested in Still Ready for Work were motivated by skills for work and wanting to feel active and useful. The survey analysis also shows that 83% of respondents felt employment could reduce their isolation and loneliness.

Older Workers interested in Mid-Career Reviews were motivated to participate because they want to learn about their options and to be more informed about retirement. Only 37% of those asked were aware of their retirement rights, and 30% had access to information on financial awareness.



Fig. 9 Age at Work Evaluation - Sept 2019 to Mar 2020

Stakeholder Consultations

After establishing the programme, interviews were held with project teams and partners on the delivery and business involved. The researcher conducted consultations with ten delivery partners who were programme managers and directors from national offices at BITC and Age, and three Employer organisations, incorporating qualitative research, especially those interviewed with lived experience. The researcher facilitated a discussion based on the desk research. The hypothesis of the potential domains/outcomes was not to guide the conversations with stakeholders but to develop themes for the broad delivery of the programme and start to help create an initial language to develop the conversations.

The process also considered positive and negative outcomes that can or have happened for Older Workers and Employers, focussing on the key outcomes.

Delivery Partners Interviews

Ten representatives from delivery partners were also interviewed, with representatives from Scotland, Northern Ireland, and Wales. The discussion guide used can be found in the appendix. This discussion guide aimed to gather in-depth information about the Age at Work programme from key project leaders. It covered programme structure, collaboration between partner organisations, success metrics, and areas for improvement.

One of the key questions asked was, "What does the success of the programme (Age at Work) look like for you overall? Looking back four years in time?". Specific themes that emerged relating to outcomes were as follows these have been categorised by Stakeholders:

Outcomes for Employers: Changes to policies and practices to support Older Workers

One Delivery Partner spoke of the challenges facing Employers of Older Worker, and the changes needed.

"There is still an attitude towards age at work, and there is age discrimination, people not being able to retire, and reduced pensions. A wider view of the ageing workforce and what is available to them needs to change."

Another Delivery Partner saw success as the programme generating systemic change -

"We need to ensure a longstanding culture of change, not just a "sheep dip"

This was echoed by other Delivery Partners

"We need to change attitudes from employers in recruitment and retention"

"Deep dive with a group of employers to see a longer-term difference with employers."

Outcomes for Older Workers

The key outcomes emerging focused on the challenges for Older Worker in terms of their routes into employment, the barriers of lack of confidence and key skills:

⇒ Older Worker in Employment

Delivery Partners stated they wanted to see more Older Workers employed and in sustained employment, and they expect material change after four years of the programme.

"Ultimately, the difference on the ground, a higher level of evidence of social change."

⇒ Confidence of Older Employees

Many of the Delivery Partners spoke about changing attitudes toward Older Workers and increasing confidence for those in and out of work.

"Mental attitude of the older employees, how confident do they feel as an employee."

⇒ Increased Skills

The delivery partners observed an increase in the Older Workers' skills, particularly in digital skills, and their ability to adapt to the modern workforce.

"How are they (Older Workers) staying relevant in a changing world, how transferable are their skills."

After this initial stage, an initial draft Theory of Change was developed (later refined) and shown below.

Employer Interviews

The interviews were conducted online over Microsoft Teams or the phone with Employers who had engaged with the programme. A discussion guide was prepared and is appended to this report, based on the initial survey. To that end, the findings below are analysed by stakeholder group headings. Direct questions on unintended and negative outcomes were included to provide a fairer picture of the true social value created and provide insights to assess and who else they think may be affected. Employers were asked follow-up questions such as "How does that make you feel?" "Why is that important to you?" and "What happened then?" to obtain further insights.

We heard from three employers that had been involved with the programme at an early stage, with one representing Scotland, Northern Ireland, and Wales. These individual in-depth interviews are designed to be able to get them to talk more freely. The interview guidance is in the Appendices. The guide was designed to understand an employer's perspective on age diversity in the workplace and their interest in the Age at Work programme, with a focus on employers' reasons for caring about age, challenges of an ageing workforce, perceived benefits of an age-inclusive workplace, and the value and success of the age at work programme.

The researcher focused on asking the employers about what they saw as the value and success of the programme to understand the stakeholder's outcomes and to understand the relative importance. Specific themes that emerged relating to outcomes were as follows these have been categorised by Stakeholders:

Outcomes for Employers

Changes to policies and practices to support Older Workers

A change in the Employer's policies and practices that would lead to an adapted or flexible workplace. With Employers offering more flexible working conditions and adapting their policies to suit older employees better, allowing them to work longer and more comfortably.

One Employer said a successful outcome would be a flexible retirement journey.

"The bank is moving away from a rigid retirement approach, promoting flexibility in retirement planning. This aligns with our goal of integrating age-related considerations into their broader organisational strategies. The value of the Age at Work programme also lies in external insights and collaboration; sense checking our approach; helping us to do the right thing; and opening our eyes to issues."

Another Employer described retention of employees through flexibility as a successful outcome.

"The primary reward is the potential for improved retention of experienced employees through more flexible work arrangements, thus keeping the workforce diverse and skilled. Success means seeing an increase in flexible working conditions within companies and the workforce, accommodating the needs of older employees."

The third Employer aims to change their policies to support more to deliver the desired changes.

"To provide relevant opportunities and flexibility, accommodating the unique needs of older employees. By focusing on these objectives, the Council aims to create a more inclusive, supportive, and age-friendly city, benefiting older adults, employers, and the community as a whole."

Leadership in the Age Agenda

Another outcome the Employers described was the leadership agenda, and enhancing the organisation's reputation in the workplace. One Employer said:

"Being involved in the Age at Work programme enhances the organisation's reputation and demonstrates a commitment to age diversity and inclusion."

Another Employer spoke of the programme's collaborative nature, sharing best practices and becoming a leader in the Age Agenda.

They expressed this as the organisation "aims to position itself at the forefront of organisations addressing age-related issues, setting the tone and pace for others to follow. Participation in the Age at Work programme provides valuable insights from other organisations, fostering collaboration and shared learning to implement best practices."

Part of this included wider community engagement, as one Employer wanted to see a *"Continued momentum in promoting age-friendly practices, with greater engagement from larger employers and public sector."*

Outcomes for Older Workers

Increased in confidence for Older Workers

A key outcome that was described in the interviews was a change in attitude towards and for Older Workers.

One Employer described an increase in positive attitudes from the organisation and colleagues.

"A shift in attitude towards older employees, with a happier and more supported workforce. We would offer relevant opportunities and flexibility, and employees would feel confident in discussing their needs." which in turn would support Older Worker in feeling more confident:

"Older employees feeling supported, confident, and able to approach us about their needs and conditions."

An attitudinal shift in Older Workers abilities and importance- *"A change in attitude towards Older Workers, recognising their value and supporting them in the workforce."*

Another Employer discussed raising awareness around employing Older Workers.

"Raising awareness among colleagues about the benefits and challenges of recruiting Older Workers is a key goal. This includes addressing any naivety and providing tools to identify and bridge gaps in current practices."

Improve recruitment and retention of Older Workers

Employment of Older Workers was spoken about in two ways, in the retention of Older Workers as an employee and making the organisation attractive to new Older Workers employees.

"Recognising the unique contributions of older employees—such as their knowledge, skills, and customer-centric approach—aligns with the Bank's goal of "delighting the customer" by leveraging the rich, diverse experience of their staff. By addressing age-related issues and promoting flexibility, the Bank hopes to enhance employee engagement and retention, making the bank an employer of choice in a competitive global market."

Simply put, one Employer saw success as an increase in the employment of Older Workers:

"Success would mean a higher percentage of older people employed and a reduction in the number of economically inactive older adults in Belfast."

Another Employer saw their attractiveness to Older Workers and sustained employment as an important outcome.

"By fostering a more age-friendly recruitment process, the Recruitment Organisation hopes to become more attractive to older job seekers. Although asking about age in recruitment is not permissible, we can still analyse the age profile of the workforce over time, conduct retention and profile analyses, and understand the reasons behind employee departures. Finding effective recruitment methods rather than just focusing on the message is crucial. This includes identifying roles suitable for Older Workers, such as in contact centres, soft services, and roles that allow home working."

Success for us includes achieving a more balanced workforce with a good representation of employees over 50."

Interviews with Older Workers

To summarise the consultations with stakeholders, the emerging well-defined outcomes are as follows:

Outcomes for Older Workers

- Older Worker in Employment / Improve recruitment and retention of Older Workers
- Confidence of Older Employees / Increased in confidence for Older Workers
- Increased Skills

Outcomes for Employers

- Changes to policies and practices to support Older Workers
- Leadership in the Age Agenda

EXAMPLE: Ruth Rosson (58), ex-civil servant. Still Ready for Work, MCR & 121 support.

"Rosie gave information on careers which covered the career planning model and what transferable skills employers are looking for. Eamon gave an overview of employment support skills. This was a very good 2 day course with interesting and relevant information and they also provided yummy food.

At the end of the course, I was given the opportunity for an informal interview & work placement with Triangle Housing to see what the job involved and I loved it. With Rosie's help, I was successful in securing the Support Assistant position with Triangle Housing as a direct result in taking part in the Age at Work programme. Thank you to the Age at Work service for giving me support and direction at this stage in my life!"

Pilot Survey for Older Workers

As covered earlier in this report, Older Workers participate in the programme in several ways for one or multiple interactions, due to the devolved nature of the programme being delivered across three nations and predominantly online. To be able to capture these stakeholders' thoughts on outcomes and impact, it was decided by the researcher and Age at Work delivery team to conduct a pilot survey to be able to use the feedback for development and depth of outcomes.

As part of the programme feedback process, the researcher added two key questions. Older Workers were asked **"What motivated you to participate in this programme?"** on signing up for the programme and then after the programme **"If you were to sum up, in one sentence, the impact the Age at Work Programme(s) you participated in had for you, what would you say?"**. The researcher collated and analysed the responses from the first year of the programme.

The researcher analysed the responses through the lens of knowledge, attitudes, and behaviours to understand what changes lead to what outcomes. This approach to Knowledge, Attitudes, and Behaviour is adapted from Bennett's Hierarchy of Evaluation⁶, which is based on seven sequential steps (input, activities, participation, reaction, knowledge, skills, opinions, aspirations, practice change, and impact). The researcher used the hierarchy to workshop the programme's outcomes, and has categorised the outcomes against Knowledge, Attitudes and Behaviours.

Older Workers were asked, "**What motivated you to participate in this programme?**" to give the outcomes they were interested in seeing. 188 responses were received.

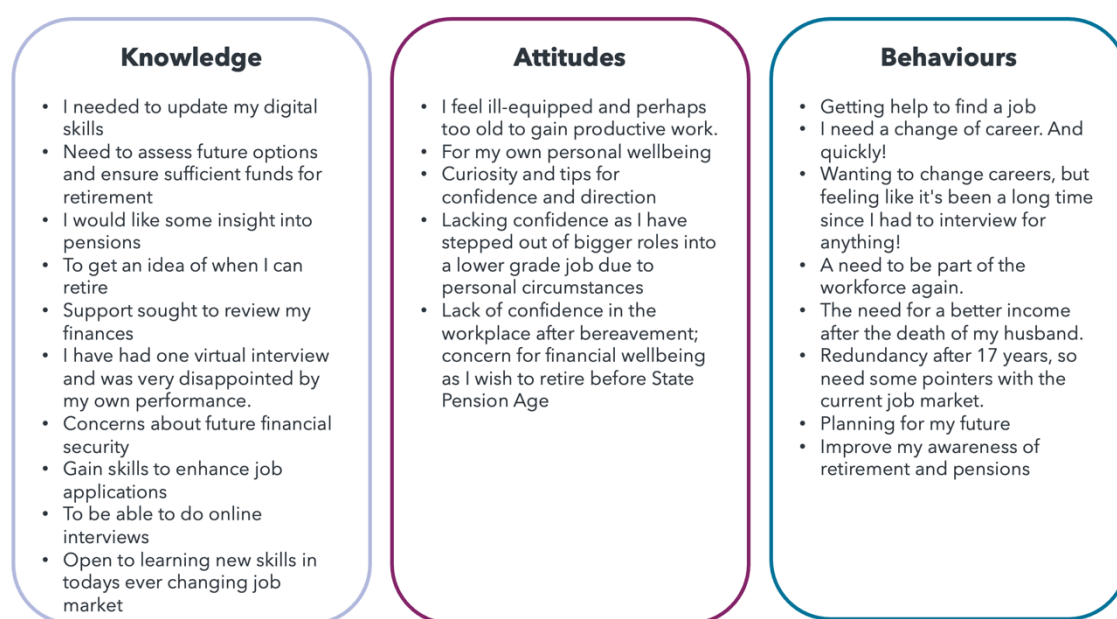


Fig. 10: "What motivated you to participate in this programme?" Response sorted by Knowledge, Attitudes and Behaviors

After Older Workers participated in the programme, they were asked to sum up the impact, 27 responses were received for the question "**If you were to sum up, in one sentence, the impact the Age at Work Programme(s) you participated in had for you, what would you say?**"

⁶ Rockwell, K. and Bennett, C., 2004. Targeting outcomes of programs: A hierarchy for targeting outcomes and evaluating their achievement.

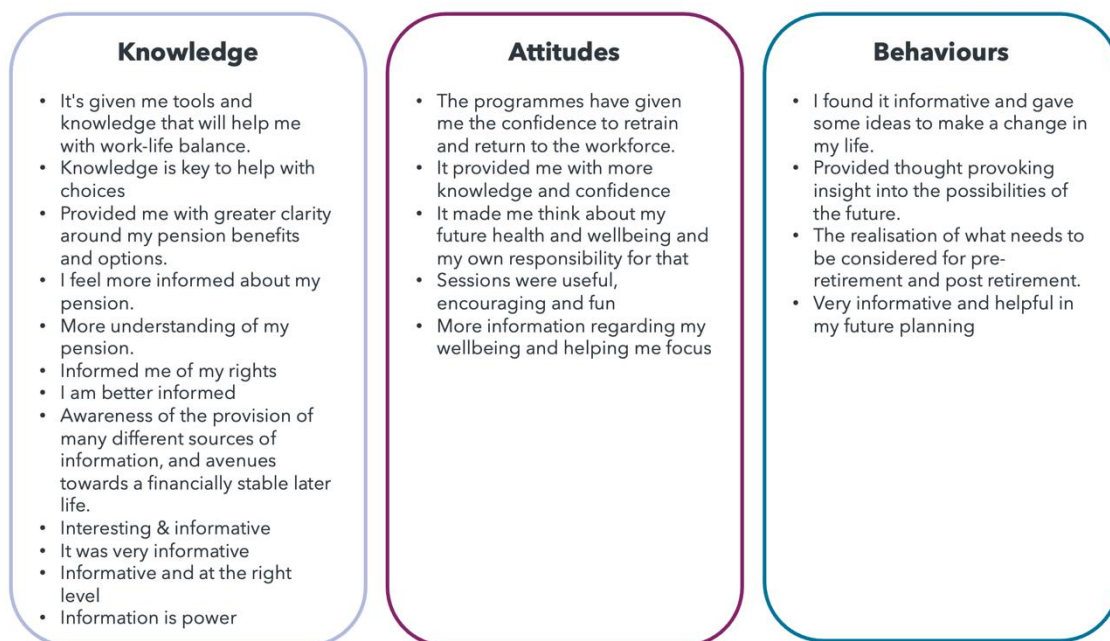


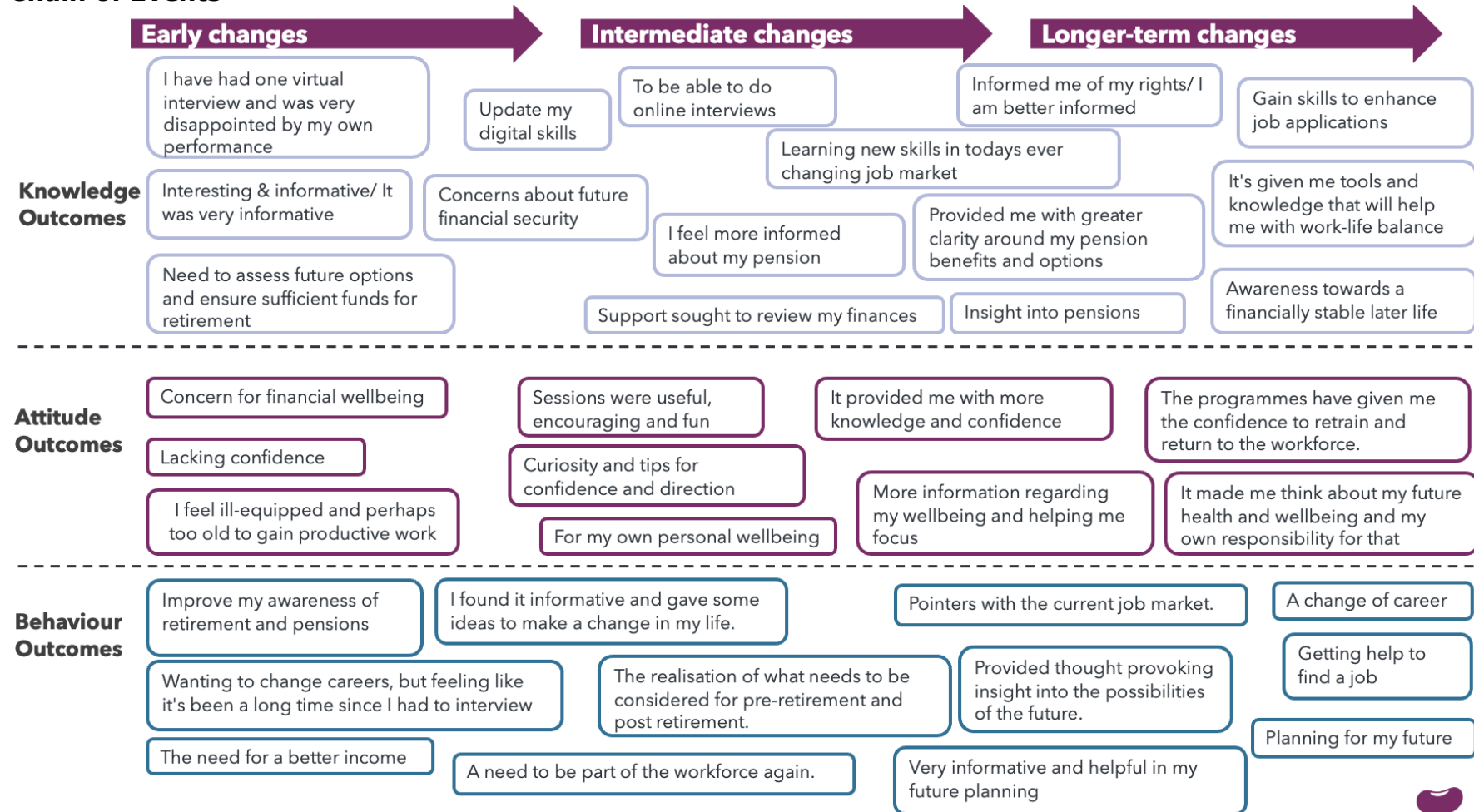
Fig. 11: "If you were to sum up, in one sentence, the impact the Age at Work Programme(s) you participated in had for you, what would you say?" Response sorted by Knowledge, Attitudes and Behaviors

The researcher then held a discussion with the delivery partners, asking them to plot the outcomes between early, intermediate, and longer-term changes. The wording was kept based on the Older Workers' language. The researcher then used the responses to questions to create a Chain of Events, a key part of Social Value International's Principle Two. This is also a critical research tool in process evaluation.

The approach also used the Bennett Hierarchy (Bennett, 2004)⁷ approach to break down the changes by Knowledge, Attitudes, and Behaviours while removing any exact duplicates. The researcher analysed the workshop data and found overlaps in the longer-term changes.

⁷ Rockwell, K. and Bennett, C., 2004. Targeting outcomes of programs: A hierarchy for targeting outcomes and evaluating their achievement.

Chain of Events



Deciding on Relevant Outcomes to Include

A key consideration for conducting a social value assessment is deciding on the relevant outcomes to include. Principle 4: Only Include What is Material⁸ was used to understand that there could be many outcomes with information and evidence to report. However, including only the most relevant outcomes would give stakeholders an accurate and fair picture of the impact to draw reasonable conclusions.

Throughout the consultation, the research was framed by using the Bennett Hierarchy - particularly Knowledge, Attitudes and Behaviours. Several key outcomes became clearer when looking at the longer-term outcomes articulated in the chain of events and the changes experienced by the Older Workers and Employers. In addition, the language used by the Older Workers, Employers and Delivery Partners grouped outcomes together, such as grouping outcomes around future planning that included employment-related outcomes as well as knowledge and skills.

The researcher then analysed the qualitative data about the outcomes they experienced from the programme intervention to decide on relevant outcomes to include and where they intersect.

Outcomes for Older Workers

Knowledge

- Increased skills
- Awareness of financial stability

Attitudes

- Confidence in the future
- Feeling more connected

The qualitative data from Employers, Delivery Partners and Older Workers clearly showed that increased confidence was a key outcome for Older Workers.

Many of the Delivery Partners spoke about changing attitudes toward Older Workers and increasing confidence for those in and out of work.

"Mental attitude of the older employees, how confident do they feel as an employee."

Employers spoke of confidence: *"Older employees feel supported, confident, and able to approach us about their needs and conditions."*

And Older Workers reported *"The programmes have given me the confidence to retrain and return to the workforce."*

⁸ <https://www.socialvalueint.org/principle4-only-include-what-is-material>

While on the other hand, the outcome felt more connected, the terminology varied and overlapped depending on who we spoke to and what they perceived to be outcomes; for example, Older Workers spoke about "a need to be part of the workforce again" often after children had left home or a bereavement. Employers want to see "a shift in attitude towards older employees, with a happier and more supported workforce." This sentiment is seen in the initial research, as the survey analysis showed that 83% of respondents felt employment could reduce their isolation and loneliness. For this report, we will use the term feeling more connected when looking at a reduction in isolation and loneliness.

Behaviours

- Sustained employment
- Professional growth and career advancement

The analysis revealed an area of overlap between "Planning for my future," "Awareness towards a financially stable later life," and "insight into the possibilities of the future." From the Older Workers' responses, when investigating these outcomes further, the outcomes represented different areas: gaining or improving employment and financial capability. As researcher, we have used our judgement to break this into three outcomes. Firstly, awareness of financial stability, which correlates with the Older Workers' specific programmes and insights into pensions.

And secondly, financially stable later in life and possibility for the future through sustained employment, for Older Workers looking to change roles or return to the workforce.

Older Workers response - "I need a change of career. And quickly!"

And thirdly, professional growth and career advancement for those Older Workers in work, planning for the future. Looking at the responses from Employers, wanting to retain skilled workers.

"The bank is moving away from a rigid retirement approach, promoting flexibility in retirement planning."

"The primary reward is the potential for improved retention of experienced employees through more flexible work arrangements, thus keeping the workforce diverse and skilled"

In analysing the responses, we summarised the reported changes into outcomes, detailed below, which in turn fed into the revised Theory of Change development outlined in Fig. 15 below.

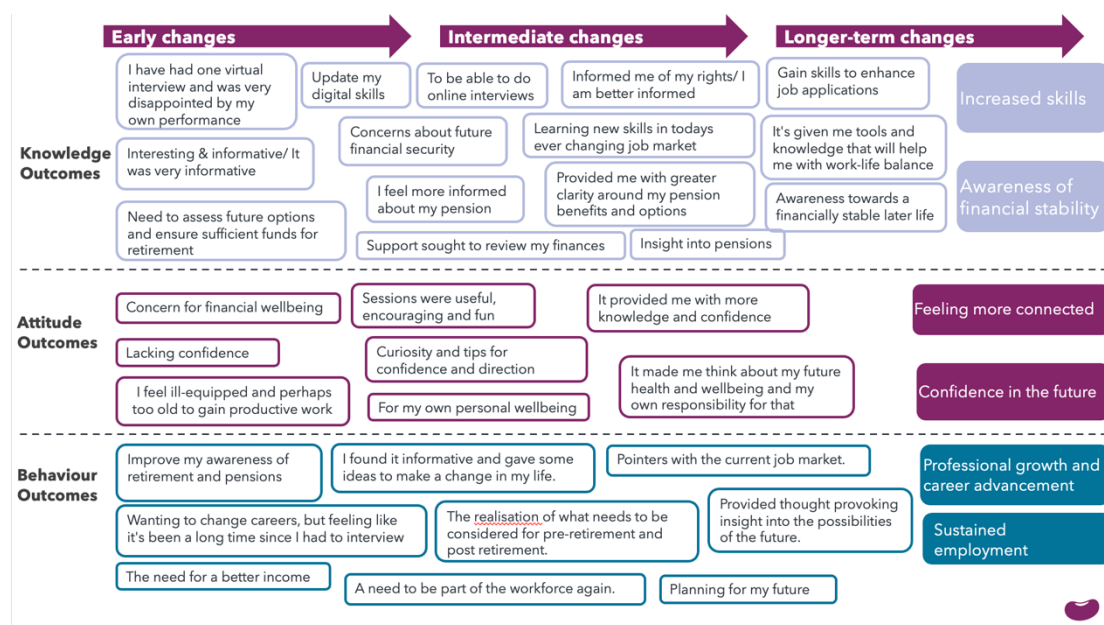


Fig 13: Perceived Changes, with Outcomes

Outcomes for Employers

Due to the nature of the programme and project, attitudinal changes were more complex to track; therefore, the outcomes for Employers are focused on knowledge and behaviour changes.

Knowledge

- Awareness of age inclusivity challenges
- Improve age inclusivity

Behaviours

- Changes to policies and practices to support Older Workers
- Recruiting new Older Workers
- Leadership in the Age Agenda

After speaking to the Employers and Delivery Partners, the outcomes were initially categorised as *changes to policies and practices to support Older Workers* and *Leadership in the Age Agenda*. However, after analysis of the responses from Older Workers and discussion with the Age at Work team, the outcomes were expanded.

Looking at *changes to policies and practices to support Older Workers* needed a change in knowledge from employers to track the outcomes as the programme generates systemic change appropriately.

*"There is still an attitude towards age at work and age discrimination."
"We need to ensure a longstanding culture of change, not just a "sheep dip."*

"A shift in attitude towards older employees, with a happier and more supported workforce. We would offer relevant opportunities and flexibility, and employees would feel confident discussing their needs."

Therefore, the outcome development from the researcher's judgment mapped the process as follows:

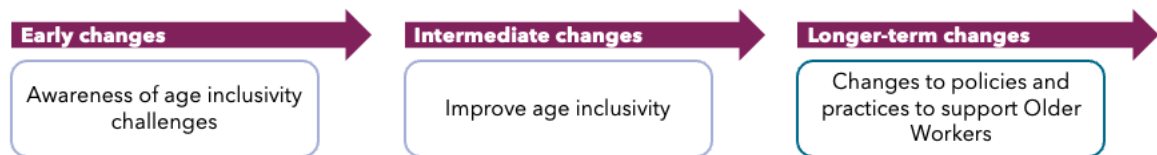


Fig 14: Timeline of outcomes for Employers, based on qualitative research.

Employers should learn about the issues facing Older Workers, actively listen to Older Workers about age inclusivity through insights and recommendations, and finally, make a long-term commitment to changing policies and practices to support Older Workers. For this study, the initial single outcome should be broken down into three points on the journey towards age inclusivity for employers to track long-term change.

The analysis identified the outcome of recruiting Older Workers as employers discussing *"fostering a more age-friendly recruitment process"* and *"increasing the percentage of older people employed while reducing the number of economically inactive older adults in Belfast."* Initially, this was seen as an effort to improve the recruitment and retention of Older Workers. However, the researcher found it challenging to gauge the retention from the employers' point of view as a positive or negative outcome since many of the Older Workers expressed a desire to change jobs or careers but didn't know how to do so. Therefore, this outcome primarily reflects improvements in recruitment by the employers, focusing solely on changes felt by the employers.

Outcomes matrix

A Theory of Change is a detailed explanation of how and why a desired change is expected to occur in a specific context. It is based on understanding the relationship between inputs, processes, outputs, and outcomes. Supporting Principle 2: Understand what changes⁹, the Theory of Change was used as a planning tool for the initial research to better

⁹ <https://www.socialvalueint.org/principle-2-understand-what-changes#:~:text=Standard%20on%20applying%20Principle%202,that%20are%20intended%20and%20unintended.>

understand the intended and unintended outcomes of programmes and express what Age at Work was 'aiming at' accomplishing.

As illustrated, the researcher worked with Age at Work to develop a Theory of Change based on consultations with employers and delivery partners, the pilot survey of Older Workers, and the researcher's judgements made through analysing the Bennett Hierarchy and the Chain of Events diagram.

An initial Theory of Change was developed in 2020. And used as a basis for development of the quantitative questionnaires used through the subsequent five years of the programme, shown below.

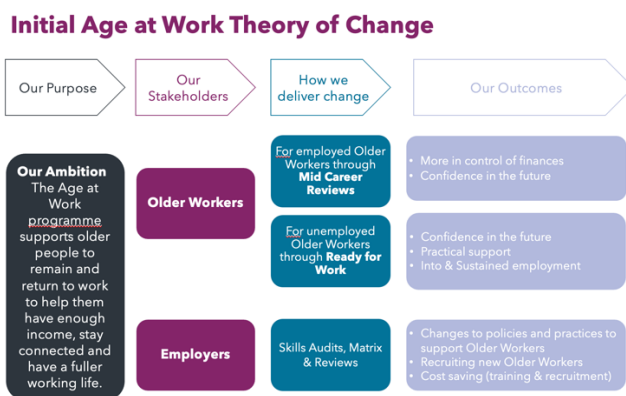


Fig 15a: Initial Theory of Change, 2020

While this was used as a base for the project's next step: engagement with the stakeholders, it was then refined reflecting Principle 2: Understand What Changes¹⁰, the researcher looked at how change was created and evaluated this through evidence gathered, recognising positive and negative changes and those intended and unintended. It is this more holistic process that enabled the development of a more refined Theory of Change shown below.

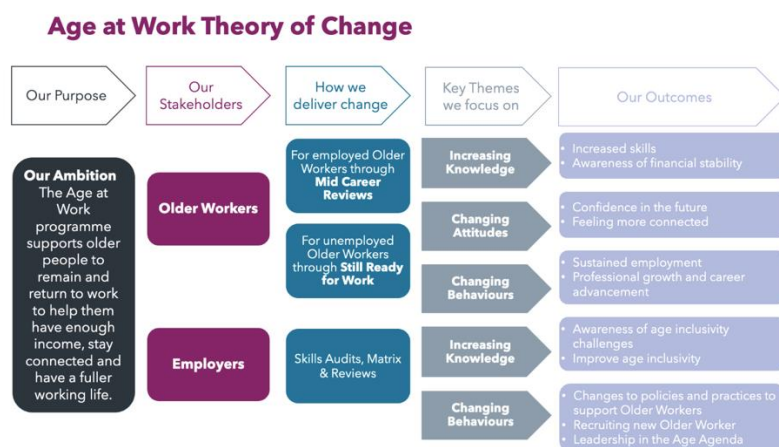


Fig.15b: Age at Work Theory of Change, 2024

¹⁰ <https://www.socialvalueint.org/principle-2-understand-what-changes#:~:text=Principle%20%3A%20Understand%20What%20Changes>

Some of the 11 key outcomes have multiple indicators due to the nature of the outcomes; for example, when looking at increased skills, some Older Workers achieved an outcome of increased employability skills, and others increased their digital skills. The table below summarises the extension of these outcomes for Older Workers and Employers.

Older Workers	
Knowledge	
Increased skills	Increased skills, specifically related to digital skills & employability
Awareness of financial stability	Older Workers planning for the future through increased financial capability
Attitudes	
Confidence in the future	Changes to Older Workers confidence in work and future (with outcomes for positive and negative changes)
Feeling more connected	Improved wellbeing with a reduction in loneliness and feeling more connected with people
Behaviours	
Sustained employment	Older Workers in employment (through RFW and independently)
Professional growth and career advancement	Older Workers remaining in employment with professional growth and career advancement

Employers	
Knowledge	
Improved age inclusivity	Insights and recommendations on how to increase age inclusivity
Awareness of age inclusivity challenges	Employers learning about the issues facing Older Worker
Behaviours	
Changes to policies and practices to support Older Workers	Employers making changes to support Older Workers
Recruiting new Older Workers	Older Workers recruited through the programme
Leadership in the Age Agenda	Employers sharing best practices

Measuring Outcomes

The next stage was to oversee the extent of these outcomes through quantitative research. This section presents analysis and findings based on the quantitative data collected. It also demonstrates Principle 6: Be Transparent, as each decision is explained and documented concerning stakeholders, outcomes, and indicators.

Based on the qualitative research and the identification of the key outcomes detailed above, the researcher worked with Age at Work to develop and refine pre, post and six months after questionnaires for Older Workers and the questionnaires used by Employers engaged in the programme. These online questionnaires were sent out by Age at Work and went to everyone who had taken part in at least one session of the programme, and are appended to this report.

The researcher also conducted desk research to assess the most appropriate methodology and which indicators or questions might be most effective at assessing change, based on ensuring as much rigour as possible and drawing on peer-reviewed documents where possible, details of these are appended.

This research approach was agreed for three reasons:

Firstly, it was deemed important to include as many people as possible in this research.

In fact, this approach allowed us to conduct research among all the Older Workers that took part in the Age at Work programme 2020-2024, rather than a sample. Furthermore, given the different starting and completion points for Older Workers, additional 'one off' research conducted at one point in time would not enable a true reflection of every candidate's journey. By enabling all Older Workers to report outcomes at the most appropriate time for them, we are able to report a more realistic change, or social value.

Secondly, the consistent approach to conduct post programme, and sustained evaluation at six months post programme for all Older Workers, allowed the researcher to understand both positive and negative outcomes, and the sustained outcomes experienced six months after the programme's completion. This avoided the temptation to focus research on longer term outcomes on those that the team were still in touch with, which would have introduced a bias to the research. This is particularly important on a multi-year programme.

Thirdly, the researcher's policy is to conduct research based on the Government's Social Research Inclusive Research Guidance which states that researcher should take the time to understand the barriers and enablers of different designs, especially when researching seldom heard or marginalised communities, and encourages co-production with organisations and representatives of those communities.

With that in mind, discussions with Age at Work concluded that the questions would best be sent out to Older Workers by Age at Work delivery partners to ensure both a higher response rate and a more honest and open response. As researcher, we acknowledge there are some limitations with this route for collection, but we can be confident given the scale of the responses and the balance with the in-depth interviews.

Fourthly, this approach was taken so that the research could be used to improve the programme, feeding back to the teams delivering the programmes on a quarterly basis. In fact, a key element of this project was to develop and update Age at Work’s systems to ensure future measurement of social value assessment was hard-wired into the core systems so that it becomes less reliant on external researcher to quantify change among its Older Workers, enabling more of its finding to be spent on supporting Older Workers.

This is a fundamental value core to the researcher undertaking the analysis, ensuring that its clients (such as Age at Work) are left not only with insights into how and how much social value is created, but also have the tools, systems and understanding to conduct future social value measurement. This was also seen as particularly important for a National Lottery programme, that the learnings could be used for both the Age Inclusivity sector, as well as better understanding learnings from multi-partner and multi-nation programmes.

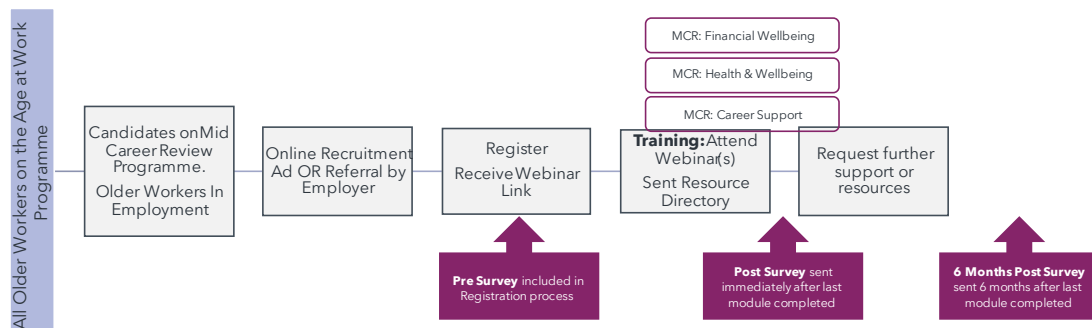


Fig14: Surveys undertaken by Older Workers in employment, against the flow of the MCR programme

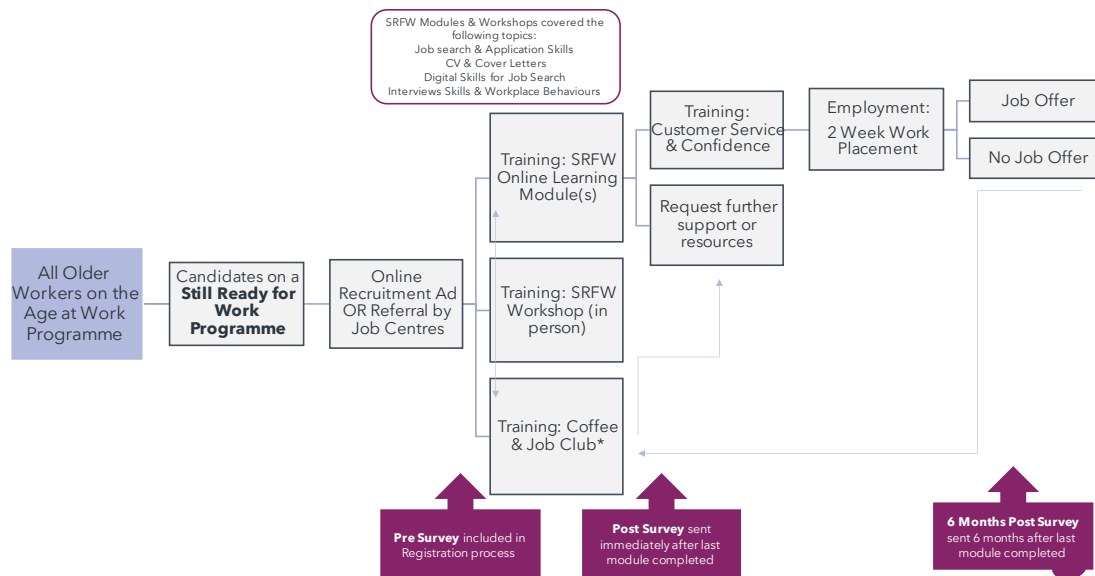


Fig. 15 Surveys undertaken by Older Workers looking for employment, against the flow of the Still Ready for Work programme

Data Collection

To that end, quantitative research was conducted among all Older Worker participants in the Age at Work programme, across Northern Ireland, Wales and Scotland.

Older Workers Survey Respondents					
	Northern Ireland	Wales	Scotland	Blank	Total
Pre-intervention Survey	1,267	567	204	134	2,172
Post-intervention Survey	1008	324	128	23	1,483
6 Months Post	537	170	47	7	761

Indicators

The outcome indicators in this study were captured working with the delivery partners and Older Workers, asking the stakeholders themselves to report what outcomes they had experienced.

Unintended/negative

In any research, there can be a tendency among participants to exhibit positive biases or confirmation bias, which means that they may say what they think the researcher want to hear.

To account for this, tests were set up to uncover any potential negative outcomes via the engagement with the Colleagues and Older Workers

with direct questions on unintended and negative outcomes. In addition, Colleagues collected the information from participants with whom they had built a trusted relationship, to reduce the tendency to 'claim' a positive outcome. In addition, space was given in the data collection and qualitative interviews where the questions were worded in a way that allowed the stakeholders to express both positive and negative changes equally.

The clearest example of a negative outcome was a negative mindset change, experienced by 49 Older Workers participating in the Still Ready for Work programme, and others through the Mid-Career Reviews. This outcome has therefore been recorded in the data and values discounted from total social value gain.

For Employers, an unintended negative response would be to drop out of the programme, although this happened only four times across the five years and three nations. For all of these, it was due to a contact leaving or HR needing to focus on the pandemic focus, rather than any negative outcomes:

"Main contact has been on furlough for over a year (April 2020 - May 2021) and then left the organisation. Despite efforts, cannot get new contact and re-engage".

"Contacts have moved on and many redundancies due to COVID situation. Can't secure engagement. Dropped out."

Quantitative Research Results: 2020-2024

Older Workers		
Knowledge		
Increased skills	Increased skills, specifically related to digital skills & employability	<ul style="list-style-type: none"> • 585 Older Workers (SRFW) reported increased employability skills. (Including skills and knowledge of how to write an effective CV and interview skills) • 609 Older Workers increased digital skills with relate RFW programme
Awareness of financial stability	Older Workers (MCR) planning for the future through increased financial capability	<ul style="list-style-type: none"> • 2,178 increased knowledge of financial options (MCR)
Attitudes		
Confidence in the future	Changes to Older Workers confidence in work and future (with outcomes for positive and negative changes)	<ul style="list-style-type: none"> • 668 feel more confident. SRFW = 177 Older Workers increased in confidence • Older Workers decreased in confidence MCR: 136, SRWF: 49
Feeling more connected	Improved wellbeing with a reduction in loneliness and feeling more connected with people	<ul style="list-style-type: none"> • SRFW Pre to post feeling close to other people all of the time or often. 47 older people feel more connected to people
Behaviours		
Sustained employment	Older Workers in employment	<ul style="list-style-type: none"> • 106 Older Workers secured and sustained employment through SRFW • 194 Older Worker secured and sustained employment independently. SRFW
Professional growth and career advancement	Older Workers remaining in employment, with professional growth and career advancement	<ul style="list-style-type: none"> • 132 Older Workers on SRFW progressing into a new role for career advancement

Employers		
Knowledge		

Improved age inclusivity	Insights and recommendations on how to increase age inclusivity	<ul style="list-style-type: none"> • 199 Employers clear on how to increase age inclusivity
Awareness of age inclusivity challenges	Employers learning about the issues facing Older Worker	<ul style="list-style-type: none"> • 206 increased knowledge of issues facing Older Workers
Behaviours		
Changes to policies and practices to support Older Workers	Employers adapted the workplace for Older Workers	<ul style="list-style-type: none"> • 115 Employers adapted the workplace for Older Workers
Recruiting new Older Worker	Older Workers recruited through the programme	<ul style="list-style-type: none"> • 106 Older Workers recruited through the programme
Leadership in the Age Agenda	Employers sharing best practice	164 Employers sharing best practice

Value of Outcomes

To understand the value of the outcomes the researcher focused on Principle 3: Value the Things That Matter^{xi} to make decisions about allocating resources between different options to recognise the values of stakeholders, and to be able to quantify the relative importance of different outcomes.

For this project, the researcher used a monetary approach to derive the valuations. To be able to set the financial proxies against the outcomes, it was decided that the most rigorous approach for the study was to use secondary evidence from well-respected and peer-reviewed resources, where these proxies are aligned with the outcomes identified, and to base causality on the research conducted among Older Workers, Employers and on academic research.

Due to the focus of the programme, the researcher utilised government databases and reports such as 'Future of an Ageing Population' alongside well-evidenced data sources such as those from HACT Social Value Bank. To ensure the researcher and Age at Work were confident to use these values, each was investigated to ensure there would be no double counting and overlap. Age at Work delivery partners were consulted to ensure the rationale was the most appropriate for the audience and purpose of the analysis.

The stakeholder subgroups were also selected to ensure the stakeholder experience was captured correctly so as to not to overclaim. This is why, for example, further sub-groups emerge through the outcomes.

For example, the focused Still Ready for Work work-placement provision generated very similar outcomes with each participant feeling more secure with greater integration into the community. However, analysis of our research shows that some Older Workers moved further in the chain of events than others – and therefore by selecting three different financial proxies, we can be confident we have captured the relative worth of the different changes in people's lives from the perspective of those with direct experience.

The following section outlines how the outcomes have been valued, with outcome description, indicators, financial proxy source and monetary values listed.

^{xi} <https://www.socialvalueint.org/principle-3-value-the-things-that-matter#:~:text=Standard%20on%20applying%20Principle%203andtext=Value%20refers%20to%20the%20relative,Valuing%20the%20things%20that%20matter.>

Outcomes for Older Workers

Knowledge

Outcome: Increased skills

Indicator 1: Older Workers (on the Still Ready for Work programme) reported increased skills and knowledge of how to write an effective CV and improve their employability skills.

Selection of valuation: Age at Work tailors their employability provision to Older Workers, spending many days over a period of at least three months with Older Workers. 1:2:1 interviews show the importance of the practical tools and help provided through the Age at Work programme with participants particularly speaking about the support they had in writing current and relevant CVs. To understand the value of these practical resources, we undertook a review of professional CV writing services available online. While some one-to-one services charge up to £750, online CV services range are more likely to be £99 – £300. In the UK, we looked at the most used services through CVPeopleUK.co.uk, which offers a CV written with a cover letter for £289 with a one-hour consultation. Recruitment agency services often offer external consultancy and deliver the support on an hourly rate, charging on average £50ph for 1-1s, £250 for a half-day session, and £500 for the full day.

While we know from the in-depth feedback that Age at Work provides a much more tailored approach, we have attributed a value halfway between the two services mentioned above of £269.50 per person.

Indicator 2: Older Workers increased digital skills with related Still Ready for Work programme

Selection of valuation:

Across the UK the gap between the digital skills possessed by workers and demand for digital skills by employers is growing. It is important that adults have the digital skills they need to participate fully in modern society, and thrive in traditional non-digital roles. 30% of skill-shortage vacancies result from a lack of digital skills^{xii}, specifically, basic digital skills (commonly used software/digital applications). Advanced digital skills

^{xii} [Department for Education \(2020\) Employer Skills Survey 2019: Summary report Research report](#)

are seen as essential across the UK economy to deliver the digital solutions required by customers and citizens^{xiii}.

The programme focussed on digital skills for securing employment - such as training and access to hardware, training on software and online job searching.

To that end, Just Economics^{xiv} definition of digital skills for work, including ability to online job search is calculated at £1,777.14 per person.

Outcome: Awareness of Financial Stability

Indicator: Older Workers increase their knowledge of financial options through the Mid Career Reviews

Selection of valuation:

While the Mid-career reviews are conducted over at least three hours (and up to three half days sessions), it is felt that the insights gained (& the extent to which information is retained and used 6 months later), the researcher concluded that the value is equivalent to at an hour one-to-one financial advice.

According to Which? consumers can expect to pay anything between £30 to £250 an hour for one-to-one advice with a qualified financial adviser, but they conclude that the average cost in 2023 is £196 per hour (based on information provided by Which? in May 2023).

The Financial Conduct Authority research agrees that pre-retirement financial information and advice can play a constructive role in helping Older Workers plan for retirement. Academic research reinforces this by showing that workplace financial education increases the likelihood and amount of retirement savings (Kaiser et al., 2021).

Attitudes

Outcome: Confidence in the future

Indicator 1: Positive changes to Older Workers confidence in work and future

Indicator 2: Negative changes to Older Workers confidence in work and future Older Workers

^{xiii} <https://www.gov.uk/government/publications/applying-outcome-2-of-the-social-value-model-in-ddat-contracts/guidance-on-applying-outcome-2-of-the-social-value-model-to-digital-data-and-technology-contracts-html>

^{xiv} <https://www.justeconomics.co.uk/uploads/reports/Just-Economics-BT-Valuing-Digital-Inclusion.pdf>

Selection of valuation: Confidence in the future was assessed at the beginning of working with Age at Work, and at the end of the programme, and six months later. We have included people who increased confidence, as well as – as a negative outcome – those who reduced their confidence in the future through the course of Age at Work’s provision.

Elements of the Warwick Edinburgh Mindset Wellbeing Behavioural Scale was used as it is one of the most used and highly regarded methodology for measuring mindset and wellbeing, developed by academics from the Universities of Warwick, Edinburgh, Anglia Ruskin, Queen Mary of London, and Bristol, as well NHS Scotland and England. Since its development, WEMWBS has been widely adopted and successfully used in a wide range of settings and provides a single score indicating a participants’ overall wellbeing, and therefore is often used to measure the effects of interventions to improve mental wellbeing. This is made more rigorous by the fact it is asked of every candidate before any Age at Work interventions are started, and at the end of the programme, the process of identifying changes in – and therefore be used to assess the impact of the intervention.

In assigning a value to this indicator, we based the value on research conducted by Simetrica Jacobs and HACT¹ conducted in 2017 and used by social value professionals regularly ever since. This research indicates that a financial proxy for increased positive mindset and confidence should be £9,238 per person (before any causality reductions).

In the research, we not only analysed the increase (or occasional decrease) in ‘confidence in the future’ scores but also queried the relative value of increased confidence in the workplace. There was consistency among all Candidates interviewed, and indeed, this was considered by the Age at Work’s partner team perhaps the most important factor in Older Workers that they had supported.

Outcome: Feeling more connected

Indicator: Older Workers having Improved wellbeing with a reduction in loneliness and feeling more connected with people

Selection of valuation:

In discussions with Older Workers taking part in the Still Ready for Work programme, it was really clear that there was a renewed sense of connection with older people that had been out of work for an extended period of time.

There is a wide variety of valuations of the impact (and alleviation) of loneliness, with one of the most cited and used in social value reporting to be Social Finance^{xv}’s value of the cost of tackling loneliness being up to £12,000 per person – include fiscal, economic and social costs. However, given the focus of the programme was not loneliness and the majority of

^{xv} https://www.socialfinance.org.uk/assets/documents/investing_to_tackle_loneliness.pdf

participants being 50-65, the chosen valuation is based more on the cost of activity to alleviate loneliness. In fact, the valuation has been based on the ONS Family Spending Survey analysis^{xvi} which concluded that this was the annual amount single retired (or single out of work people aged over 50) households who are mainly dependent on state pension spend on 'recreation and culture', to alleviate social isolation and loneliness. This was considered to be £988 in 2012, and therefore this has been increased to reflect the net present value, based on Bank of England inflation calculator to £1378.99.

Behaviours

Outcome: Sustained employment

Selection of valuation: The ultimate aim of the Still Ready for Work programme is to support Older Workers into work. However, in developing the impact framework for this programme, we were conscious that 'into employment' data often hides the cycle of in and out of employment that those with the highest barriers to work have difficulty escaping.

To enable social mobility, or to escape the 'last in, first out' redundancy cycle for Older Workers, people need to be in 'decent work' – usually guaranteed, permanent employment. This is particularly true for those with caring responsibilities (higher among Older Workers) as Carers tend to enter jobs at the same rate as the average but leave employment at about twice the rate. To that end, we have used DWP's definition of sustained employment. We have based the financial value to the individual moving into work on the National TOMs Framework value of £20,429 for employment of someone who has been unemployed for over a year (NT3).

Indicator 1: Older Workers secured and sustained employment through SRFW job placements.

Indicator 2: Older Workers secured and sustained employment independently

We have two pieces of data which determine the employment figure. There are 106 people who have gained employment as a direct result of the Still Ready for Work scheme, as monitored by Age at Work delivery teams. However, our 6 months later survey among participants shows that a further 194 are in sustained employment.

So while the indicators have a similar overall value, the different indicators vary and have adjusted attribution dependent on whether these jobs were directly brokered by the Still Ready for Work team or not.

Outcome: Professional growth and career advancement

The Mid-Career Reviews are conducted within the workplace, and therefore the focus is more on supporting Older Workers with knowledge, skills and confidence to progress in careers, as well as planning for

^{xvi} ONS Family Spending Survey, 2012

retirement. This was not an intended specific outcome of the programme, but one identified by stakeholders in the evaluation process.

Indicator 1 Older Workers progressing in their employment

Selection of valuation: Progression in career from undertaking a part time course, as valued through Department for Business Innovation and Skills, Valuing Adult Learning report^{xvii} using the contingent valuation method, found that a course that enabled someone to progress in their work or career is, on average, valued at £1,070 on average.

Indicator 2: Older Workers changing careers

Selection of valuation: This financial proxy has been used to value a better idea what to do with life / career focus, based on the Personnel Career Management^{xviii}, and used in a SROI report by Social Value Lab. While there are two costs quoted, based on face to face or online coaching, given the majority of MCRs were delivered remotely, the cost is based on working with a coach over Skype, which is estimated to cost £1,095 excluding VAT

Outcomes for Employers

Knowledge

Outcome: Awareness of age inclusivity challenges

Indicator: Employers learning about the issues facing Older Workers and increasing their knowledge through access to Ready for Work advice to employees

Selection of valuation: The research with employers demonstrates that the employers valued the insights that the MidCareerReviews offered, not just for the individual Older Workers, but for the organisation as a whole, and the People Professional teams. In the interviews, we asked organisations to estimate what they would be willing to be paid. These were then then tested with the other employers involved (there were 40 in total). The most common response was £500+, but on taking the average value offered, we place the value at £476.19. It should be noted that at the end of the programme (and funding), this approach was real-life tested by Northern Ireland and Wales offering MidCareerReviews as a paid for offer, above this value.

Behaviours

Outcome: Improved Age Inclusivity - Changes to policies and practices to support Older Workers

^{xvii} BIS Research Paper, November 2012, Paul Dolan and Daniel Fujiwara: Department for Business Innovation and Skills, Valuing Adult Learning: Comparing Well-being Valuation to Contingent Valuation\n\n<http://www.bis.gov.uk/assets/biscore/further-education-skills/docs/v/12-1127-valuing-adult-learning-comparing-wellbeing-to-contingent>\n\n

^{xviii} <http://www.personalcareermanagement.com/graduate.php>

Indicator: Insights and recommendations on how to increase age inclusivity. Employers have actively listened to Older Workers about age inclusivity through Audits and employer feedback, and adapted workplace to better support Older Workers.

Selection of valuation: A key part of the age of work programme is to increase the extent of inclusive workplaces. The review undertaken provides a matrix, audit, or toolkit, depending on the nation, in which the employer operates, and provides a gap analysis of current practice against suggested, or best practice approaches.

Feedback has shown how valuable this process, and the subsequent gap analysis is, alongside guidance about how to increase their approach to age inclusivity. This is reinforced by 100% of employers saying they are now aware of how to create an age-inclusive work environment and the support they have received has generated ideas to create age-friendly initiatives.

Taking a willingness to pay valuation approach, employers suggest that the cost of having a review conducted by an age and workplace specialist would be £4,000 -£12,000 (without the support to change those policies and practices). However, it should also be noted that the offer to employers to conduct this review with no cost attached could have (and is likely to have) attracted more employers than would have paid for expert review. For the purposes of this report, the mid figure (£8,000) has been selected. To be cautious, only cost savings from the review among those who have changed policies or practices, have been included.

Outcome: Recruiting new Older Workers

Indicator 1 Older Workers recruited through the programme

Selection of valuation: Recruitment costs - Reduced employment costs As well as the value to the individual, and the reduced state burden of someone moving into work, the Still Ready for Work program, in this case reduced the cost of recruitment.

The cost per hire figure in the UK, according to GlassdoorHR resources, is £3,000 with it taking on average, 27.5 days of employers' time to recruit^{xix}. It is not just the cost but the fact that is incredibly difficult to fill positions in the retail sector at the moment. While in January 2023 the British Retail Consortium announced a fall in the UK retail vacancy rate, it was still 13.8%. This was announced alongside details of increasing store closure due to high vacancies. The Age at Work programme not only provided suitable candidates with relevant experience but provided - through the partnership - the ability to trial candidates through job placements. To this

^{xix} Glassdoor Economic Research, How Long Does it Take to Hire? Interview Duration in 25 Countries, August 9, 2017

end, we feel the average cost per hire figure is valid for the 13 people that secured sustained employment through these partnerships.

Outcome: Leadership in the Age Agenda

Indicator 1: Employers sharing best practice

Selection of valuation:

164 employers report the benefit of being able to share and learn from best practice through workshops, and annual conferences offered at no cost to participants through the funding provided for the Age at Work programme. The valuation is therefore based on the average of two UK-based Age Inclusive conferences and best practice courses in 2024. This was the Festival of Work costing £125 and the CIPD Age Inclusive session costing £1,765 +VAT. The average of these is £924, which is the value taken for this indicator. It should be noted that likely expenses incurred in attending a conference such as meals, accommodation or travelling have not been added to this cost.

Causality of Outcomes

Causality is about understanding how one thing leads to another, but in social value and social return on investment studies, it is also about understanding what outcomes were not caused through the activity the research refers to. This is a crucial step when assessing that we take into consideration the quality of outcomes. For example, Principle Five: Do not Overclaim^{xx}, was instrumental in making sure that the researcher only claim the value that activities are responsible for creating the referenced baselines, trends and benchmarks to help assess the extent to which a change is caused by the activity, as opposed to other factors.

In the SROI Value Map appended to this report, all the social value calculations show causality that decreases the value (or future value), such as deadweight, attribution, drop-off, and displacement—and these are also all detailed and covered below. It should be noted that, disappointingly, most assured SROI reports available in the Social Value International resource library do not contain details of the causality values in the body of the report, and as the value map is often not contained within the published report, there is no always transparency in reports on causality values chosen. This report seeks to support future SROI analysis in the sector, and therefore has included full details – of the values and the reasoning – in the body of the report below.

All causality elements were considered throughout the research, although not all were gathered quantitatively, as the recommendation from Age at Work delivery partners was to keep the questions as short and easy as possible due to the risk of their increased length and complexity. In addition, there was a risk of the candidate stakeholders misinterpreting the questions on these rates as the majority of stakeholders are members of the general public and many without previous knowledge.

Instead, these percentage values are based on interviews with Older Workers and feedback from Age at Work Colleagues, quantitative measures from the stakeholders identified, as well as peer reviewed guidance, where provided. This included, for example guidance on deadweight, and what would have happened anyway (such as proportion of older works who plan for retirement) and displacement (such as DWP guidance which estimates that only 20% of jobs created through job-matching are 'additional').

Older Workers were asked the following to ascertain some of these measures. For example, when discussing increased skills and knowledge:

- Thinking about your increasing skills, what else contributed to this change? Who was it, and to what extent did they contribute?
- And to what extent was this a result of Age at Work? What do you think would have happened anyway?
- If you had to give it a number from 1 to 10, where 10 is, all of the change was down to Age at Work and zero where none of the change was down to Age at Work, which would you say?

^{xx} <https://www.socialvalueint.org/principle-5-do-not-overclaim>

Overall, a strong thread running through the feedback from Older Workers and analysis was the importance of Age at Work's programme's services, with Older Workers sharing that they had not been offered a service like this before through recruitment agencies or job centres – and had not given up any other service or offer by working with Age at Work.

Similarly, there is little support provision within workplaces for Older Workers, with stakeholders stating that they were not receiving this level of specialist service elsewhere.

This feedback and wider research is reflected in judgements on displacement. While the researcher, encouraged by Age at Work's willingness to share all methodology and data, have shared the exact % used in the value map to calculate social return below, it should be noted that this is not an approach used in other SVI assured reports, and is a valuable addition for the social value sector to be able to replicate assumptions, where their resources limit the ability to conduct such in-depth research and reporting.

Applying the causality of outcomes ensures that the total value created is a truer reflection of the change that occurred as a result of working with Age at Work programme.

Duration of Outcomes

It was important for the research that the analysis did not overstate the duration of the outcomes. A maximum duration of three years was adopted, based on feedback from Older Workers in the interviews, backed up by feedback from Age at Work delivery partners. Some outcomes are only experienced during the period of the activity, such as the outcome of Older Workers increasing skills, specifically related to employability. While some endure well into the future, such as Older Workers achieving a qualification which allows for future employment.

Due to the scope and timeline of the research study, the research took place over the period of funding – from 2020 to 2024, and this report was written in Summer 2024. Therefore, there has been the opportunity to not just assess knowledge, attitudes and behaviours of Older Workers after provision (post-programme), but also six months after the invention. This allows the researcher are able to make substantial assumptions about sustained change.

The researcher also drew from academic research and evidence, such as from the Department of Work and Pensions^{xxi}, when considering sustained employment, and that people are more likely to maintain their employment long-term after 6-month of employment. Over 1 in 5 people who leave benefits and enter work return within 13 weeks, and 40% are back on benefits within six months, according to the Department of Work

^{xxi} <https://www.nao.org.uk/wp-content/uploads/2007/11/070832.pdf>

and Pensions ^{xxii}. National Audit Office 2012 analysis of Department for Work and Pensions data on Net fiscal benefit (cost) shows only when an individual has been in employment for more than six months, is it of net benefit to society.

The attached value map details the duration across each outcome.

Deadweight, Attribution, Displacement and Drop Off

- **Deadweight** is a measure of the amount of outcome that would have happened even if the activity had not taken place, and it is calculated as a percentage based on the question: What would have happened without the activity?
- **Attribution** is an assessment of how much of the outcome was caused by the contribution of other organisations or people. It is calculated as a percentage based on the question: Who else contributed to the change?
- **Displacement** is an assessment of how much of the outcome displaced other outcomes elsewhere. The qualitative data collection provided insights which have guided the rate of displacement used, shown as a % against the question: What activity did you displace?
- **Drop off** is where the outcome reduces its effect over the course of time beyond looking at duration. What % drop off is there in future year

The detail below outlines the rationale of causality for each of the outcomes, as well as the actual percentages used – which are also detailed on the value map.

^{xxii} <https://assets.publishing.service.gov.uk/media/5a755c1ded915d6faf2b2620/dwp-annual-report-and-accounts-2011-2012.pdf>

Outcomes for Older Workers

Knowledge

Outcome: Increased skills

Indicator 1: Older Workers (RfW) reported increased skills and knowledge of how to write an effective CV & employability skills

	%	Rationale
Deadweight:	40	While other services are available online, they are not free.
Displacement:	20	A number of job centres offer services, but Older Workers report challenges accessing, and are not tailored to the particular interview, sector or job of RfW participants.
Attribution:	20	Interviewees could not cite anyone else who contributed to their employability skills & knowledge. Caution suggests that some (estimated at 20%) attribution should be given to other influences by others.
Drop off:	20	The skills and employability goals are a mix of practical tools such as updated CVs, re-framing convictions, and interview techniques which are often learned techniques that can be applied longer term, hence the lower drop off rate.

Indicator 2: Older Workers increased digital skills with related RfW programme

	%	Rationale
Deadweight:	20	There are schemes available, such as Third Age
Attribution:	20	As above
Displacement:	0	Digital skills and access were provided through hardware, software and skills, especially during the pandemic.
Drop off:	40	It was felt by interviewees that while these skills were very valuable, they would be more likely to get 'out of date' quicker than employability skills – the conclusion from the focus group was 'twice as quick'.

Outcome: Awareness of Financial Stability

Indicator: Older Workers increase their knowledge of financial options through the Mid Career Reviews

	%	Rationale
Deadweight:	43	In the UK, knowledge of financial options is really needed. 43% of British Older Workers

		said they are only vaguely or not at all aware of what their finances will be once they retire, while a third of British pensioners only have the State pension to rely upon, with no additional sources of wealth or income.
Displacement:	10	Based on assumptions laid out above about the need of Age at Work and lack of alternative support, and the interview focus on the lack of support elsewhere for Older Workers' financial support in planning for 50&60 year olds.
Drop off:	10	Once taught money habits are hard to change. The Money & Pension Service reported that most money habits are fixed by age 7 ^{xxiii} , but that financial education can bring about long-term change - such as reducing debts and focussing on budgeting & delayed gratification.
Attribution:	5	This was a specific programme, where Older Workers expressly reported outcomes exclusively as a result of Age at Work's interventions.

Attitudes

Outcome: Confidence in the future

Indicator 1: Positive changes to Older Workers confidence in work and future Older Workers through MCRs

	%	Rationale
Deadweight:	27	Contextual evidence shows that pre-post changes tend to overstate the impact of an intervention and to redress this we followed HACT recommendation to use a deadweight of 27% based on the Housing and Communities Agency (HCA) guidelines on a deadweight for health (Dancer, 2014).
Displacement:	10	Based on assumptions laid out above about the need of Age at Work and lack of alternative support, and the interview focus on the lack of support elsewhere for Older Workers' wellbeing and resulting mindset change.
Attribution:	10	Any outcome based on pre & post surveys faces challenges on attribution. However, the survey focussed on the extent to which the change had come as a result of the programme, and the 6 months later demonstrates that this
Drop off:	50	There is surprisingly little academic data about a sustained change in wellbeing – or how long an increase in positive mindset likely to last.

^{xxiii} <https://www.young-enterprise.org.uk/wp-content/uploads/2021/07/Inquiry-on-primary-school-aged-financial-education-Report.pdf>

		The researcher has exercised caution here, estimating that only half of the Older Workers affected with sustain the change in confidence after a year. The researcher has suggested a higher drop off for those who have taken part in the MCR, as the length and extent of contact with the Age at Work programme was lower than for SRfW participants
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Indicator 2: Positive changes to Older Workers confidence in work and future Older Workers through Still Ready for Work Programme.

	%	Rationale
Deadweight:	27	Contextual evidence shows that pre-post changes tend to overstate the impact of an intervention and to redress this we followed HACT recommendation to use a deadweight of 27% based on the Housing and Communities Agency (HCA) guidelines on a deadweight for health (Dancer, 2014).
Displacement:	10	Based on assumptions laid out above about the need of Age at Work and lack of alternative support, and the interview focus on the lack of support elsewhere for Older Workers' wellbeing and resulting mindset change.
Attribution:	10	
Drop off:	20	There is surprisingly little academic data about a sustained change in wellbeing – or how long an increase in positive mindset likely to last. The researcher has suggested a lower drop off for those who have taken part in the SfrW, as the length and extent of contact with the Age at Work programme was lower than for MCR participants

Indicator 2: Negative changes to Older Workers confidence in work and future Older Workers for MCRs

	%	Rationale
Deadweight:	27	As above
Displacement:	10	As above
Attribution:	10	As above
Drop off:	50	As above

	%	Rationale
Deadweight:	27	As above
Displacement:	10	As above
Attribution:	10	As above
Drop off:	20	As above

Outcome: Feeling more connected

Indicator: Older Workers Improved wellbeing with a reduction in loneliness and feeling more connected with people

	%	Rationale
Deadweight:	30	34% of people over 50 feel lonely at least some of the time. While the measures drawn for this indicator did not include the lockdown period of the pandemic, it should be recognised that between 2019 and 2024 COVID a large part in the ability to feel connected or disconnected from others.
Displacement:	20	Based on assumptions laid out above about the need of Age at Work and lack of alternative support, and the interview focus on the lack of support elsewhere for Older Workers’ wellbeing and resulting mindset change.
Attribution:	40	While connection is something that was highly discussed by Older Workers, it is felt that this is also included in increased positive mindset and wellbeing. To that extent, a lower attribution has been included.
Drop off:	50	The feeling of connection is closely associated with being part of the programme, and connecting with other older people or Older Workers experiencing the same challenges. A high drop off has been added here, as this feeling is likely to fade over time.

Behaviours

Outcome: Sustained employment

Indicator 1: Older Workers secured and sustained employment through RFW

	%	Rationale
Deadweight:	20	Joseph Rowntree Foundation latest figures find that the proportion of unemployed benefit claimants who move into work each year is 20% in 2021-2022 (fallen from 30% in 2014-2015) ^{xxiv} . We can therefore assume 20% would have achieved employment without Age at Work.
Displacement:	80	This is in line with guidance from the Department of Work and Pensions, which estimates that only 20% of jobs created through job-matching are ‘additional’. ^{xxv}
Attribution:	10	Researcher asked Older Workers who else contributed to them securing a job. The vast

^{xxiv} ‘Work first can work better’ Joseph Rowntree Foundation, January 2024

^{xxv} Department for Work and Pensions (2011), The introduction of Jobcentre Plus: An evaluation of labour market impacts. Research Report No 7181

		majority of Older Workers attributed all the change to Age at Work, although as other agencies have access to the Older Workers (such as Job Centres), professional opinion based on similar programmes, suggests that it would be more realistic to suggest other parties contribute 25% to this outcome.
Drop off:	10	As we haven't achieved a year after the start date of most of the Older Workers' jobs, this calculation is based on those from previous years that we know have sustained a job for over a year

Indicator 2: Older Workers secured and sustained employment independently

	%	Rationale
Deadweight:	20	Joseph Rowntree Foundation latest figures find that the proportion of unemployed benefit claimants who move into work each year is 20% in 2021-2022 (fallen from 30% in 2014-2015) ^{xxvi} . We can therefore assume 20% would have achieved employment without Age at Work.
Displacement:	80	This is in line with guidance from the Department of Work and Pensions, which estimates that only 20% of jobs created through job-matching are 'additional'. ^{xxvii}
Attribution:	40	As jobs were found independently, there is an automatic reduction in attribution compared to those who found a job directly through the programme. Nevertheless, Older Workers did attribute their success to support provided. Professional opinion based on similar programmes, suggests that it would be more realistic to suggest other parties contribute 25% to this outcome.
Drop off:	40	As we haven't achieved a year after the start date of some of the Older Workers' jobs, this calculation is based on those from previous years that we know have sustained a job for over a year.

Outcome: Professional growth and career advancement

Indicator 1 Older Workers progressing in their employment

	%	Rationale
Deadweight:	20	The research consistently indicated that any progression would not have occurred without the MidCareer Reviews. However, best practice suggests that it should be acknowledged that this may have occurred anyway.
Attribution:	20	In the questionnaire and in interviews, employees talked specifically about the impact

^{xxvi} 'Work first can work better' Joseph Rowntree Foundation, January 2024

^{xxvii} Department for Work and Pensions (2011), The introduction of Jobcentre Plus: An evaluation of labour market impacts. Research Report No 7181

		that the MidCareer Reviews had on their confidence to apply for and achieve progression. However, it is safe to assume that other factors may have had an influence on this change.
Displacement:	40	This is in line with guidance from the Department of Work and Pensions, which estimates that only 20% of jobs are 'additional'. ^{xxviii} We have added extra caution, given the employee is likely to be known to the employer.
Drop off:	40	The researcher has no way of knowing whether any progression was sustained, although feedback suggests that it was. To be safe, we have attributed that 40% of progression fell off each year.

Indicator 2: Older Workers changing careers

	%	Rationale
Deadweight:	20	The research consistently indicated that any progression would not have occurred without the MidCareer Reviews. However, best practice suggests that it should be acknowledged that this may have occurred anyway.
Attribution:	20	In the questionnaire and in interviews, employees talked specifically about the impact that the MidCareer Reviews had on their confidence to apply for and achieve progression. However, it is safe to assume that other factors may have had an influence on this change.
Displacement:	40	This is in line with guidance from the Department of Work and Pensions, which estimates that only 20% of jobs are 'additional'. ^{xxix} We have added extra caution, given that this may have displaced other older workers from progressing.
Drop off:	40	The researcher has no way of knowing whether any progression was sustained, although feedback suggests that it was. To be safe, we have attributed that 40% of progression fell off each year.

^{xxviii} Department for Work and Pensions (2011), The introduction of Jobcentre Plus: An evaluation of labour market impacts. Research Report No 7181

^{xxix} Department for Work and Pensions (2011), The introduction of Jobcentre Plus: An evaluation of labour market impacts. Research Report No 7181

Outcomes for Employers

Knowledge

Outcome: Improved Age Inclusivity

Indicator 1: Insights and recommendations on how to increase age inclusivity. Employers have actively listened to Older Workers about age inclusivity through Audits and employer feedback.

	%	Rationale
Deadweight:	10	In the needs analysis for this funding, the gap in specific advice for employers was identified. Employers confirmed this in the research process.
Attribution:	20	Employers report that there are other sources of insights from employees, such as annual surveys and line manager feedback. However, given it's laser focus on Older Workers and 'clear recommendations', the audits were consistently attributed to be responsible for this outcome
Displacement:	0	Other organisations, such as CBI or local Chambers of Commerce, to which Employers may be members, did not offer bespoke Age Inclusive audits with recommendations at the time of this programme.
Drop off:	0	The audit enabled an increased understanding by the employer of the needs of older workers. This as event therefore had no drop off.

Behaviours

Outcome: Employers learning about the issues facing Older Workers and increasing their knowledge through access to Ready for Work advice to employees & Changes to policies and practices to support Older Workers

Indicator 1: Employers adapted the workplace to support Older Workers

	%	Rationale
Deadweight:	50	There has been more awareness of the need for employers to support Older Workers in the workplace, especially around menopause in the same period of time as the programme.
Attribution:	50	Based on feedback from employers.
Displacement:	20	We have set a displacement value at 20%, given the increasing emphasis placed on menopause programmes (for example) over the last few years – due in part to the work conducted by the Age at Work programme.
Drop off:	50	As above

Outcome: Recruiting new Older Workers

Indicator 1 Older Workers recruited through the programme

	%	Rationale
Deadweight:	20	As above
Attribution:	0	This was the specific vehicle through which people were recruited, so 100% attribution.
Displacement:	20	Older Workers could be recruited from elsewhere, but little other provision.
Drop off:	0	The recruitment happened at the time recorded, so would not have a drop off. (Sustained employment' is taken into account though the outcomes for Older Workers)

Outcome: Leadership in the Age Agenda**Indicator 1:** Employers sharing best practice

	%	Rationale
Deadweight:	0	It is of course possible to learn best practice in other ways, but while there are a number of conferences and networks aimed at including age inclusivity in England, employers told the research team that there were <u>no</u> others that they were aware of in Northern Ireland, Wales or Scotland at this time.
Attribution:	0	The valuation is based on attendance of the Age Leadership Group in each of NI, Scotland and Wales, active participation of each nation's Learning Network and Network Events. Only those employers who actively participated have been included, so 100% attribution is recorded.
Displacement:	10	There are other options available to Employers now (although none identified at the start of the programme when Employers engaged)
Drop off:	0	Learning best practice is not something that fades or is less known.

Inputs

In order to calculate Age at Work's social return on investment, the social value needs to be divided by the cost spent creating that value.



Will allow us to understand total social value created through programme & (divided by input £) the social return created based on every £1 invested.

Inputs can come in many forms, including money, time, donations, emotional input, social capital, etc.

Overall, the research shows that the total social value created through the outcomes of Age at Work's activity over five years through of Older Workers is £16.6 million over three years.

The financial value of the investment was determined by the restricted funding provided by the National Lottery Community Fund, enabling all six partners to deliver the programme across the three nations. This was £2,244,944.

The largest contribution to social value is the increased confidence among Older Workers created through working with Age at Work. This accounts for 40% of the overall social value. The idea that this was the largest proportion was tested with Age at Work partners and Older Workers in the validation stage (in advance of the full analysis due to the end of the 5 year programme), and felt to be appropriate to their experience and received feedback.

Taking these calculations, the estimated social return on investment of Age at Work's activities is £16.6 million which can be calculated into a ratio of **£7.43 for every £1 invested**.

However, before this figure can be used, sensitivity analysis is needed to test its robustness.

Sensitivity Analysis

Sensitivity analysis was conducted to show the elements which most affect the overall social value. It is suggested in the future analysis should consider their inclusion in interviews and surveys with Older Workers (if a more accessible way to ask these questions can be created).

As stated often throughout this report a combination of desktop data analysis, stakeholder engaged conversations and subjective indicators as well as making a continual series of professional judgements, have been used to create this SROI analysis. However, it is important to assess with a sensitivity analysis the extent to which the results would change if we changed some of the assumptions made in the previous stages.

The following section indicate how that can be affected by changing the researcher' assumptions.

First of all, a sensitivity approach was used to test the impact of the financial proxies chosen. While the rationale for choosing specific financial proxies and the causality assumptions have been outlined in detail, drawing on both academic research, and listening to the people (or stakeholders) involved, there are other financial proxies that could have been chosen which ultimately impacts on the total social value calculation of Age at Work supporting its Older Workers and Employers.

This is particularly important where an outcome is responsible for a significant proportion of the total social value. With that in mind, we researched an alternative financial proxy for three outcomes and re-calculated the total social value on this basis.

Financial Capabilities:

The current proxy used for financial advice is based on an hour of financial advice. However, an alternative approach would be to use a recognised social value monetary value through HACT social value bank value of ability to save regularly (moving from time to time). Taking into account the social value bank's person-centred principles, the values are based on how they impact people's lives as they live them of £2,155 per person (before any causality reductions). This was chosen as much of the focus for Older Workers' increased financial capabilities is based on saving and planning for retirement.

Employability Skills:

Another method of employability skills is Participating in a relevant course and seeing a coach/counsellor on a fortnightly basis, based on values sourced from the Global Value Exchange. That is of £1,650^{xxx}.

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http://www.qualifax.ie/index.php?option=com_googlesearch_cse&n=30&Itemid=&cx=000879325975867386823%3Aocucshaoulm&cof=FORID%3A11&ie=ISO-8859-

Confidence - Value: As an alternative approach, we looked at the cost of a clinical Psychologist to improve psychological functioning. One social value methodology is to assess willingness to pay. However, it was clear from the interviews, that many of these Older Workers were not in employment and would not have the ability to pay or be in a place to recognise that Psychological support was needed. In retrospect the Older Workers recognised how essential it was to their progression, and the majority said that if they had the money at the time they would have been willing to pay even more than the value assigned to wellbeing in the analysis. Therefore, we looked at what it would cost to provide these services, given it was so important to Older Workers. Recent research (Koostra, 2019) ^{xxxi} indicates that, on average, 30 sessions are required for patients to recover, as indicated by self-reported symptom measures. Although the research also concludes that in practice, patients and therapists sometimes need to continue treatment over longer periods to achieve more complete symptom remission and to feel confident in the skills needed to maintain treatment gains. On average, in the UK, Clinical Psychologists £150-£200. 30 sessions @ average of £175 = equates to £5,250 per person (without any causality reductions).

Confidence: Changed duration

There is surprisingly little academic data about a sustained change in wellbeing – or how long an increase in positive mindset likely to last. The researcher has assigned a 50% annual drop off, based on qualitative feedback from Older Workers. However, to incorporate best practice in testing sensitivity, values were re-calculated on the basis that duration of outcome is shorter for confidence than others (reducing to two years instead of three).

Employer's Preference to Pay for Mid Career Reviews:

Employers suggested that the cost of having a review conducted by an age and workplace specialist would be £4,000 -£12,000 (without the support to change those policies and practices). For the purposes of this report, the mid figure (£8,000) was selected, so to incorporate best practice in testing sensitivity, values were re-calculated on the basis that employers would pay either end of that range - £4,000 or £12,000.

Leadership in the Age Agenda: Cost of Conferences

The valuation taken is based on the average of two UK-based Age Inclusive conferences and best practice courses in 2024. This was the Festival of Work costing £125 and the CIPD Age Inclusive session costing £1,765 +VAT. To ensure best practice in testing sensitivity, values were re-calculated on the basis that employers would pay either end of that range - £125 or £1,765

1&q=employability&sa=Search+this+site&hl=en&siteurl=http%3A%2F%2Fwww.qualifax.ie%2F
<https://www.google.ie/#q=counselling+cost+dublin>

^{xxxi} Kooistra, L.C., Wiersma, J.E., Ruwaard, J., Neijenhuijs, K., Lokkerbol, J., van Oppen, P., Smit, F. and Riper, H., 2019. Cost and effectiveness of blended versus standard cognitive behavioural therapy for outpatients with depression in routine specialized mental health care: pilot randomized controlled trial. *Journal of medical Internet research*, 21(10), p.e14261

Factor Changed	New SROI ratio	Difference
Financial Capabilities	9.85	+2.42
Employability Skills	7.76	+0.32
Confidence: Changed value	6.13	-1.30
Confidence: Changed duration	6.94	-0.49
Employer willingness to pay reduced to £4,000	7.30	-0.13
Employer willingness to pay increased to £12,000	7.55	+0.12
High end range for Age Inclusive Conference	7.27	-0.16
High end range for Age Inclusive Conference	7.58	+0.15

The second element of the sensitivity analysis altered the researcher's causality assumptions. In this case, the sensitivity analysis was carried out on the chosen proxies altering the causality factors to show what effect the change in the factor would have on the final SROI ratio, and its findings are in the table below. All factors relevant to outcomes were first checked individually to show that no factor had, when individually altered, a significant effect on the SROI ratio. Consequently, the table below shows the sensitivity analysis result for when the factor is altered for all outcomes at the same time.

Factor Changed	New SROI ratio	Difference
Deadweight – increase by 10%	6.43	-1.00
Deadweight - decrease by 10%	8.40	+0.97
Displacement - doubled	5.86	-1.57
Displacement - halved	8.20	+0.77
Attribution - increase by 10%	6.51	-0.92
Attribution - decrease by 10%	8.28	+0.85
Drop off – doubled	5.29	-2.14
Drop off – halved	8.70	+1.27

Overall, as would be expected, the analysis did show sensitivity, so it can be concluded that our assumptions around these rates can materially affect the result. However, the sensitivity analysis showed the largest change of ratio to be $\pm£2.42$, which illustrates that the findings, while subject to sensitivity, do not disproportionately alter the value of return.

In fact, the sensitivity analysis provides us with a full SROI range of £1: £5.29 - £9.85.

We can therefore conclude that for every pound (GBP) invested in Age at Work's activity, £7.43 of social value is created, which can also be presented in the following range £1: £5.29 - £9.85.

Verification

Verification of the results of this analysis is also important to test assumptions, conclusions, and values, and has been undertaken using a number of approaches, with Age at Work delivery partners regularly

providing feedback during the process of the research and creating the report, as well as on its findings.

In an ideal circumstance to ensure thorough verification, the researcher would have gone back to all the Older Workers and Employers interviewed and asked them for their reflections on the relative value of outcomes, the proxies used and the resulting ratio.

However, this research was conducted at the close of the programme, so the Age at Work partners were no longer in contact with the older workers and the employers after the SROI analysis was concluded.

Instead, two approaches were taken. Firstly, in anticipation, during the interviews the researcher asked Older Workers for what they would expect, what they felt might come out as the biggest element of the social value created (without prompting) and then, the relative values of employment and confidence.

"I secured a job through this programme. [My coach] provided parctivcal support and guidance to help me achieve that. But more than that, I now have the confidence that I could do it myself. If this doesn't work, I will find another job now. They have given me confidence. So, while I'm sure me getting a job if more 'worthwhile', to me it's the confidence that I can do it myself." Older Worker, Still Ready for Work

"Not having a job and feeling like you are too old to get back into the workforce is terrible for your mental health. Having someone who has your back, who has belief in you and the fact that you can secure and keep a job. That's massive. That's the power of the programme.' Older Worker, Still Ready for Work

"I have more faith that Older Workers feel more engaged and we have a renewed sense of purpose. By the way, that is crucial for the success of our organisation. I know that, as they have told me time and time again." Employer, Audit & Matrix

"It's been so successful for us and our employees, that it is the most over-subscribed course we run. It increases skills and provides people with a clearer sense of what they want to happen over the next 15 years". Employer, Mid Career Review

Secondly, the initial report and its findings were presented to delivery partners across Age at Work, to share the resulting relative values, proxies and resulting ratios. In particular, we asked what they felt might come out as the biggest element of the social value created (without prompting) and then (after sharing the findings) asked their reflections on the emerging importance of confidence in the total social value assessed.

Each of the interviewees said they expected, and hoped, that increasing confidence of Older Workers would be the biggest contribution to social value. Their feedback is detailed below:

"We talk a lot about how Older Worker sustain employment as a result of our programme, or that they have an increased understanding of financial planning or employability skills, but what I've seen in the workplace, and for those trying to get back into work, is a renewed sense of purpose, of not giving up, of having the confidence to stay or progress in work."

"The title of 'Older Worker' as you hit 50 is daunting, but to see your employer put on a course specifically for you not to plan your exit but to support you to progress, access support and new skills is so reassuring to people. That's the feedback I see the most. Because I had more confidence, I could. . "

Of course, the final element of verification is that the report has been peer reviewed by Social Value International and given assurance that the approach has reached the high standard sought by the social value sector.

In addition, prior to that the draft report has been shared with a peer researcher for their comments and allowed us to reflect on the use of Bennett Hierarchy and the changes to the Theory of Change. Their commentary assisted in shaping our professional judgements regarding the refinement of the final outcomes for social valuation.

Be Responsive

A key part of this project, as identified in the scope, was to use this research project as a guide for decision-making at strategic, tactical, and operational levels to optimise the impacts on wellbeing that the process has developed and how Age at Work will build continuous improvement into future work, beyond the National Lottery Community Fund funding. This approach reflects Social Value International's Principle 8: Be Responsive^{xxxii}, the management principle representing the imperative for organisations to respond to impact measurement with action. The following section details how 'being responsive' has been a key element throughout the project and reporting.

Firstly, throughout the process, the researcher and Age at Work worked closely together throughout the duration of the project to ensure future tracking of social value is hard-wired into the organisation, asking Older Workers to feed back on the value of the interventions at each stage. This made a significant difference to the 5 year project, but also resulted in Age NI and other partners, being less reliant on external organisations in future programmes.

Secondly, the report itself is viewed as a tool to be more responsible to the sector. The findings of this report will be published externally to share learnings to the wider older workforce and age inclusive sector. Age at Work partners have been keen from the start that the report should be used as an example of best practice, which can be replicated by others across the sector. The detail in this report will enable this.

Thirdly, the learnings from this process are summarised below so that this is of assistance with future social valuation:

- Ensure a larger sample of employers to provide more rigorous evaluation of outcomes, as well as feedback on the process. While, the researcher developed a survey for employers from the beginning, there was little response and more nudging would be needed in future.
- Given the budget restraints, the focus was in collecting quantitative data rather than investing in additional qualitative insights alongside. While this increased the statistical significance of the data and its reliability, it may have been useful to extend the qualitative interviews to create a deeper understanding of the nuances of the changes that the Age at work programme brought about for Older Workers, and how that differed across nations, and circumstances.
- Given the fact that COVID-19 and the subsequent lockdowns occurred in the middle of the 5 year programme, and accelerated its online delivery, it would be useful in any future valuations to

^{xxxii} <https://www.socialvalueint.org/principle-8-be-responsive>

better understand the impact of different mechanisms of delivery on outcomes.

- The National Lottery Community Fund liaison officer assigned to the programme commented mid-way through that how the six partners, across three nations, worked together was one of the best practice examples across their similar funding. Any future valuation may want to examine how other programmes of this nature developed their relationship and working patterns and the subsequent impact that this Age at Work partnership had on the outcomes for Older Workers and Employers.

Fourthly, this has identified some research opportunities for future studies:

- To conduct wider research on the stakeholders initially mapped, to provide a holistic understanding of Age at Work's social value creation, wider influence and better understand the impact experienced by the stakeholder groups.
- To investigate looking at a longitudinal study on the Older Workers with a focus on health and wellbeing, as it such a prominent outcome from this research study.
- It would also be helpful to understand the consequences and wide system change around age inclusivity, taking into account the local nature of the reported programme and this evaluation. This is particularly important given that the context of Age at Work has changed in the three nations over the last five years (particularly in terms of Menopause awareness), Therefore a review of how the programme may have (or not) influenced these and how the changes may have (or not) affected the lives of Older Workers would be valuable.

Finally, looking ahead, a research recommendation is to delve into the impact and success of the Age at Work's vision and for the partners to replicate the successes of the last five years in their own nations.

ENDS

Appendices

Appendix A: Older Workers Questionnaires: Still Ready for Work and Mid-Career Review

Pre-programme Registration Survey:

Age at Work COMMUNITY FUND

Age at Work Pre-programme Registration & Survey

Age at Work Registration
Thank you for registering to take part in the Age at Work programme. Please complete the following survey which collects essential capacity monitoring information, as well as data to understand the impact of the programme and how to improve things going forward.

The monitoring information contained in this survey will be treated in the strictest of confidence. This data will not be shared with those delivering the programme and will be used for monitoring purposes only, by Bean Research, an independent research company.

View our privacy policy to learn more about how we treat personal data, and comply with General Data Protection Regulations. <https://www.britain.org.uk/privacy-policy/>

Thank You!
Please provide us with the following monitoring information.

1. Marital status

- Married
- Single
- Divorced
- Prefer not to say

2. Ethnic background (if any)

- English
- Scottish
- Welsh
- Northern Irish
- UK
- Irish
- European (not British)
- Any other ethnic background
- N/A

Post-programme Survey:

Age at Work COMMUNITY FUND

Age at Work Questionnaire (Post-programme)

Thank you for participating in the Age at Work programme. We would like to understand your experience of the programme, to make further improvements and also measure what impact we can have in the over 50s community.

To ensure your confidentiality, this will not be shared with those delivering the programme. Please try to be as forthcoming as possible with your responses to provide a clear picture of any changes you experience.

Thank you for your time.

1. What is your gender?

- Female
- Male
- Not binary
- Prefer not to say

2. What is your age?

- Under 50
- 50-54
- 55-59
- 60-64
- 65-69
- 70-74
- 75+

6 Months Post-programme Survey

Age at Work COMMUNITY FUND

Age at Work Questionnaire (6 Months Post-programme)

Some time ago, you participated in the Age at Work programme. We would like to see how your earlier responses to fully understand any changes you've experienced since taking part.

Please try to be as forthcoming as possible with your responses. To ensure your confidentiality, this will not be shared with those delivering the programme.

Thank you for your time.

1. What is your gender?

- Female
- Male
- Not binary
- Prefer not to say

2. What is your age?

- Under 50
- 50-54
- 55-59
- 60-64
- 65-69
- 70-74
- 75+

Appendix B: Employers Surveys

PROBE: for employees, for prospective employees, for clients/ customers & for the business overall

How would you measure or track that progress? How should we?

Thinking specifically about the Age at Work programme, what is valuable for you as a business? And what more could be useful? Why?

This Age at Work programme in Northern Ireland, Wales & Scotland is running over the next four years. What does success of the programme look like for you overall?

OTHER STAKEHOLDERS

ISSUE: Why is the issue of Age at Work important? What's your involvement?

PROGRAMME: Why is this Age at Work programme important? What's your involvement?

And what does success look like? PROBE: for individuals, for businesses & for wider society

What do you see as some of the barriers or challenges?

We're tasked with evaluation of the programme to prove & improve – what would you be looking for from the evaluation? Why?

ⁱ Fujiwara, D., Keohane, K., Clayton, V. and Hotopp, U., 2017. Mental health and life satisfaction: the relationship between the Warwick Edinburgh mental wellbeing scale and life satisfaction a pilot study. *HACT and Simetrica: London, UK*. https://hact.org.uk/wp-content/uploads/2021/11/MentalHealth_and_LifeSatisfaction_web.pdf