

Monday 7th - Tuesday 8th November 2016

REPORT





Acknowledgements

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Report

In November 2016, Force in Mind Trust (FiMT) partnered with St George's House to deliver a consultation to explore how transition is approached and managed in different settings and sectors, and from the three different perspectives of the individual experiencing the change, the network of family and friends around the individual, and wider societal stakeholders.

This is the second consultation which FiMT has undertaken at St George's House and builds on the previous event which explored how to support individuals to lead more successful lives after a career in the UK Armed Forces.

The overall aim of this consultation is not to provide specific recommendations, but to identify areas of best practice and insight so that individuals experiencing transition in their lives might be supported more effectively. FiMT hopes the insight from this consultation will help to inform the development of future policy and services for all people transitioning in whatever aspect of their life.

As such, the consultation had the following specific objective:

To better understand how transition is approached, planned and managed in different settings so that the key components of a more successful transition can be identified.

To meet this objective, the consultation focused on experiences of how transition is managed across a number of different sectors and settings, and participants were selected to ensure that there was a range of perspectives in support of our discussions, including:

- High performing athletes transitioning out of sport
- Career transitions
- Transition from working life to retirement
- The transition from good health to illness; or suffering from physical change
- Bereavement
- Children experiencing transition
- Transition of Service personnel into civilian life

Given the wide range of sectors and views represented at this consultation, the findings contained in this report offer a strategic and general perspective on the key factors which impact on the effectiveness and outcomes of transition, rather than provide a detailed understanding of transition in specific settings.

To support and aid our discussions we decided to adopt the Schlossberg model. This model defines transition as "any event or non-event that results in changed relationships, routines, assumptions, and roles", and the theory sets out a three-stage model of transition:

¹ The Schlossberg model is described more extensively in Forces in Mind Trust's 2016 report *Understanding transition from a theoretical perspective* created for the purposes of the consultation. See also: Schlossberg, N. K., Waters, E. B., & Goodman, J. 1995. *Counselling adults in transition: Linking practice with theory* (2nd ed.). New York: Spring.



This report seeks to draw out the key themes, issues and areas of priority from the consultation, rather than provide specific recommendation for managing a successful life transition. As such it brings together insights under the following headings:

- Critical factors for a successful transition
- The individual in transition
- Personal relationships: family and friends
- The wider network: support and services
- Insights and conclusions

As with all St George's House consultations, this report has been prepared under the Chatham House rule and aims to outline from an independent standpoint the main ideas and views put forward during the consultation, with the understanding that not everybody involved in the discussions may have endorsed all the proposals and viewpoints included. Phrases that are italicised, and in speech marks, are direct unattributed quotes from the consultation and have been included to provide greater context and understanding to the issue being discussed.

Critical factors for a successful transition

We commenced our discussions by asking participants to brainstorm what they believed were the main factors behind a successful life transition. Success factors that came out of the discussions include taking a holistic approach to understanding the needs of a person transitioning, and the need to focus on both the psychological and practical aspects. The group agreed that the factors that emerged are all important for a successful transition to take place, however not all of them have to present at the same time for a transition to be successful. Rather, the discussion brought forward the various aspects which can influence a transition towards a more positive outcome.

Participants discussed the personal steps that an individual can take towards ensuring a successful transition outcome. One of the main factors is the importance of **resilience**, and for individuals to recognise their own resilience. Participants noted that resilience is partly innate, but also comes from learning from past experience, such as previous transitions and life changes. Such experience can include, but is not limited to, the first time someone moves away from their home, starts their first job or transitions from single to married life.

Maintaining a **positive attitude** and having the motivation to succeed was also identified as a success factor in transition outcomes. Certain participants contested this however, saying that it was specific to the circumstance of transition. For example, when dealing with bereavement, loss of health or identity this is not possible or even applicable. In addition, the difficulty of deconflicting an individual's identity and sense of self between the 'before' and 'after' of a transition was brought up by several participants, as an important factor to manage, particularly when an individual's identity is strongly connected to or encapsulated by an individual's work.

Transitioning in sport

When engaged in sport at a high level, individuals such as athletes in Team GB are often involved in their sport from a young age, and identification with their chosen sport often starts as a child. So when such individuals have to transition out of sport (either because of injury or retirement), the loss of that identity "is a bereavement process" for them. Participants felt that within the sporting world, there may have been an oversimplification of the issue of transitioning out of sport. Their suggestions to remedy this were to recognise transition as a complex process, acknowledge it as early as possible, and provide long-term support to people undergoing a transition.

A full **understanding** of what transition entails is also noted as a factor of success. This involves the individual and the people around them making sense of, or creating meaning out of transition. However, participants pointed out that being able to make meaning of the transition does not necessarily make it easier!

Having an element of **control** over the transition is also deemed important. In that respect, having access to certain resources is an added advantage: having the economic resources to deal with transitions, such as savings, as well as having access to emotional support, such as a support network, were identified as important factors to consider.

An element of "recognition" is also important. While transition can often be an opportunity for learning and growth, participants noted that it is important to recognise that it usually is a difficult and draining time for the individual going through the transition. The person might be dealing with strong emotions: sadness as to what they are leaving behind, as well as fear and elation looking ahead. As such, a factor to successful transition includes personal recognition of possible psychological and emotional consequences tied to the transition being undertaken.

Another further aspect of 'recognition' is to be aware that a transition will or might take place, and hence being able to **prepare** for it. This factor is also specific to certain sectors and circumstances: while leaving the military or retiring is expected, bereavement or a sudden illness or injury are generally unexpected. Therefore early planning may only be applicable and possible to certain types of transitions and certain circumstances.

Participants also brought up the importance of having a **wider network** around a person who is transitioning. Having a well-informed network of family, friends and society at large on issues surrounding transition is seen as being important by the participants. The need to align the wider network's expectations with what a transition means is important for an individual in order for them to receive constructive support.

And finally, terminology was raised by a number of participants with the term 'transition' seen by many as having a **negative connotation**. This theme was picked up by participants throughout the discussions. Some mentioned that if a change is positive, it is not referred to as a transition, but a 'change' in someone's life; but if someone has challenges or finds it difficult we refer to it as a 'transition'. Using a different term to describe the process and associated changes to something more positive was therefore put forward by some participants as a recommendation to consider.

The individual in transition

Our discussion covered the three main stages in which an individual experiences transition, reflected by the three stages of the Schlossberg model: before, during and after a transition. We have summarised the key insights identified at each stage, recognising that there can be considerable overlap at times between each of the three stages.

Preparing for and approaching the transition

When possible, planning for transition is crucial for a successful outcome. One of the main ways that this is achieved is through building **resilience**. Resilience was in fact a common theme raised throughout the consultation, and there was broad agreement that having personal resilience to be able to deal with the process of transition is seen as a key factor underpinning a successful outcome. Many felt that resilience is something that can be learnt and built upon.

For predictable transitions, **planning** is key, and involves having support from people around the person who is transitioning, so for example when a person is retiring or planning a career change, support from the employer was seen as critical. Unexpected transitions however do not allow for this, but support still remains a key factor in a successful outcome.

In an unexpected transition, however, individuals may not necessarily identify with previous transitions nor actively learn from them, and even if such transitions have been successful, it may not necessarily have been perceived as a learning opportunity by the individual. While a person can plan for transition and build resilience, participants agreed that the actual experience of transition is always different to the expectations. Nonetheless learning from the past, even routine past, can help to build resilience in support of future transition.

Participants also noted that individuals transitioning should be encouraged to inform themselves about what transition will entail. In order to assist them, **information** needs to be "accessible and accurate". Care has to be taken to ensure information is not contradictory or confusing, which can often be the case when there are so many different sources. Participants suggested information should be made accessible in a variety of formats to suit the needs of the different people, such as:

- Leaflets
- Online
- Peer networks
- Support groups

Young people in transition

Disadvantaged children and young people built up resilience through hardships they have experienced. There is evidence that shows that resilience-building is effective in children. Children have a very binary perspective of transition: you either pass or fail. Additionally, there is often a fear of failure ingrained from a young age. Hardships can be intergenerational, such as unemployment being the norm in the family, making it more difficult to rely on a support network to overcome the transition process. Additionally, young people who have suffered from homelessness go through a very different programme delivery by social care organisations, with the priority being to address the youth's basic needs (e.g. shelter and food). Participants suggested that developing resilience should be started early, from childhood, and should be included as part of the school curriculum. Resilience can also be learnt/developed as a continuous process throughout adulthood as well, and can help to 'prepare' individuals by learning from previous significant life changes.

Moving through the transition

This middle stage in the transition process was referred to by a participant as an "updating of the personal software": people learn more, the more life transitions they go through, giving each individual personal growth potential and resilience as they go through the process. Such a concept found much resonance with other participants. However the group also noted that often individuals may not realise when they are even in transition, and therefore the first step to creating such learning is having **personal awareness**.

Transition is also not a linear process, and individuals need to acknowledge that it may involve going backwards, as well as having ups and downs, before a more stable period is reached. Being in the middle of a transition can also lead to a "fear of failure." The individual can feel that they have a "personal responsibility to succeed or feel they are succeeding" when in fact there is no binary, 'pass or fail' outcome to the process. Such an approach can create huge personal stress on the individual transitioning. The concept of an individual having to 'take personal responsibility' for their transition to be as successful as possible was contentious. Some participants questioned whether this was the right approach to take, and stated that such an attitude "is putting too much of the onus on the person" and it could "lead to the feeling of failure" if a transition goes poorly.

Participants stressed that every individual approaches transition differently, and what works for one person may not work for another. The concept of "messiness" was mentioned, where an individual may be dealing with several transitions happening at once, for example developing a medical condition, losing one's job, and suffering from bereavement. As such, support interventions need to be the right kind of interventions at the right time. Sometimes a medical or psychological intervention, timed wrongly, can be more negative for the individual when the idea was to provide support.

Finally the concept of 'letting go' came up in our discussions, where moving on means letting go of a past identity or situation. Some people find that difficult, whereas others who have previously transitioned may find that easier to do. Equally some individuals may be fine remaining in touch with their old network, while others prefer to generate new social networks during this stage of transition.

Coming out of and sustaining a transition

Participants felt that an individual coming out of a transition needs time to **adjust and reflect**. If they do not have enough time to process the journey they have taken, it could impact negatively on their transition. Individuals must also be aware that a relapse is possible – but it is not necessarily a negative aspect of transition. Relapsing and taking a non-linear route is a normal part of the transition process,

and needs to be recognised and accepted. Equally, the achievement of completing a successful transition needs to be recognised by the individual and the wider network of family and friends, if the process is to be seen as a positive learning experience.

Participants had differing views on how to deal with the individual's past in respect of a life transition. Some argued that the individual should "let go" of this as part of the transition process, but others said that there might still be positive links with the past, and urged that individuals should not ignore the past: "what you're transitioning from – it's not like it hasn't happened. What can be helpful is realising what you are taking from your previous experience." This should not stop people from generating positive **new networks** and making meaning of the new situation. What really came out of our discussion is the wide variety of experiences between individuals. "Some are much more capable of dealing with change than others," some take on a lot more individual responsibility and are emotionally or otherwise better at coping.

Personal relationships: family and friends

An individual does not usually go through a transition on their own, and taking into account the role played by family and friends helps to contextualise the factors which might promote a successful transition, and also identify how family and friends can help facilitate and support a successful life transition.

Participants agreed that friends and family need to have a **good understanding** not only about the concept of transition but also the meaning of 'transition', if they are to provide appropriate support for an individual undergoing transition. Problems often arise between the individual transitioning and their network of relations due to a lack of common understanding about what the individual is actually going through in transition.

Participants felt that different types of transitions are treated differently: enforced transitions, such as athletes retiring due to injury, or receiving a medical diagnosis receive a more sympathetic approach than other types of transitions, such as losing one's job, or from criminal offending. Overall, participants agreed that there needs to be more education around transition and defining what it is. "It is necessary to accept when a person is at the point of a transition and reimagining a future."

Our discussion identified that family and friends can play a number of roles, which depend on the needs of the individual transitioning. Regardless of the support being provided, early acknowledgement of the transition is important, particularly when it is one that is planned and known about. Family and friends can provide an important, supportive, and non-judgemental environment for the individual in transition. This was however countered by some participants who felt that friends and family are in a unique and close enough position to "deliver hard truths" when required. They would know best how much pressure to apply, and what timing is best. However family or friends may not be able to support an individual transitioning, due to not having the right relationship, empathy or skills, or by simply not realising that the individual is undergoing a transition. A suggestion from participants was for the individual to be open about the transition, to enable family and friends to understand what the individual is going through.

Our discussions also focused on how family and friends can be better supported to offer a more effective support role. This focused on the provision of emotional support, guidance, listening skills, how to provide advice, and other appropriate **coaching** for family members.

While the majority of focus should be and is on the person going through the transition, several participants felt it was important to recognise the impact and effect that the transition may also be

having on the friends and family of the individual transitioning. It is important to recognise that carers and supporters also have individual needs, and that they may have difficulty adjusting to the new person or the new identity of the individual. In effect, transition should be viewed as a two-way process: the people close to the person transitioning may also need or require support, and there is a need to acknowledge the "impact of an individual's transition on family and friends and the significance of this." Carers and supporters also have individual needs, and they may have difficulty adjusting to the changed individual or their new identity. For instance, there could be too many expectations on family and friends to be a support network and as one participant explained there is a need for them to "put their own oxygen masks on first before helping others."

Participants also noted that while overall family and friends generally played a positive role for an individual transitioning, this isn't always the case. "A strong social network is part of being resilient, but that assumes that it's a helpful social network." There should not be a baseline acceptance that family and friends will provide support, or that the support will be positive. In certain circumstances it is important to recognise that "to be successful in a transition you need to walk away from your [existing] social networks." Family and friends may also not see themselves as a support network, or in fact might act as a barrier to change, in effect pulling the person backwards in their transition to a new phase of their life. This can include having a negative relationship with their family, such as a rift, or having a social network being the place that is a negative influence and prevent change. One participant used the example of gangs: "if you're trying to recover from an addiction problem, you don't want to go back to something that pushes you back in."

However, participants agreed that "support isn't always toxic", but also pointed out that changing societal culture could in fact be undermining the support that family and friends can offer. With the increase in single person households, loss of parents, or lack of close friends, individuals may have a smaller network to turn to than is generally acknowledged. The breakdown of these relationships may be the cause of the transition in itself, and needs to be followed by a "readjustment of behaviours."

In such cases, participants suggested having "enablers in a wider community" would be helpful to counter factors such as loneliness, which can be an important issue when transitioning. Other suggestions included developing a 'friendship web' to map out an individual's support network, having access to volunteers to help re-build an element of support, and widening the friendship group to include colleagues. While some participants acknowledged that the digital world can be damaging for some people, it could also be used as a force for good in terms of broadening the potential to develop wider social networks. Participants noted that there should be a "digital process of tracking and providing support" and that such virtual networks could also provide greater accessibility and confidentiality. An example was to consider the Flow application, which sends positive reinforcing messages to the user.²

Bereavement

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² The Flow application is used by women to keep track of their hormonal cycle on a monthly basis during various stages of their lives. This is a personalised application, which sends positive messages, to the user, reinforcing messages of support. Source; The Flow App. N.d. 'About.' As of 21 December 2016: http://www.theflow-app.com/about

Certain transitions, like bereavement, are often unplanned and not prepared for. When there has been a close relationship, like a marriage, certain behaviours and roles are ingrained in that relationship. When a person suffers bereavement, they need to learn to readjust their behaviours to the new situation, as part of their transition. There also needs to be acknowledgement and dialogue between friends and family of the new reality, and that there is both an individual transition, and a transition within the wider network.

The wider context: support and services

Having considered the role of the individual as well as the support of family and friends in helping an individual to achieve a successful life transition, our focus broadens to consider the wider network of support and services which are available for people experiencing transition in their lives. A key conclusion we identified is that there is a significant range of support and services available, however it can often be difficult to find the right type of service and support despite all the available information. Our discussions focused on how to support individuals to identify which services and support are required and appropriate to support an individual through a life transition.

Questions were raised around the differences in requirement for **long term versus short term support**, and how to monitor people once they had stopped using a support service – there was a concern that for someone with complex needs, there is no ongoing duty of care.

Participants agreed that services should have **cohesive access points**, and that statutory support services should work in a more coordinated manner, have shared goals, and better integrate services around the needs of the users they are supporting. In that respect, participants discussed the concept of "easy in and easy out" services that promote control and autonomy, and enable users to not create dependencies on such services and be able to exit them.

Having a more **positive narrative** and societal attitude towards transition was also mentioned. Positive outcomes should be recorded by agencies, and carried through to the media, who can play a significant role in terms of creating societal awareness.

The issue on the use of positive language was raised again by participants in the context of this wider narrative. The move away from the term 'transition' was raised within the sporting perspective, where there has been a change from 'athlete transition' to 'life beyond sport', as the language is viewed more positively. However, this new approach was challenged by other participants who felt that every sector has their parallel language, and what matters is "how we package the ideas" and "present a more positive narrative around change through our lives."

Transitioning from the criminal sector

The ability of an individual to move away from the offending cycle can be described as very difficult. Of the men who enter custody, nine out of ten have previously been incarcerated. Often, the problems are societal and economic. It is not clear who should be responsible for rehabilitating them, and whose role it is to support them – it's a "wicked problem." A participant questioned whether it should be the role of the Ministry of Justice, the police, the social care system or the private sector to provide support. The UK reoffending rates are between 60 to 65 per cent over a 12-month period. In contrast, Norway, where there is close coordination between the different organisations and services responsible for ex-offenders, the reoffending rates are of just 25 to 30 per cent over the same period. It was argued that greater coordination and responsibility were required in the UK, as demonstrated by the figures showing the UK reoffending rate.

In practical terms, participants suggested that the individual in transition needs to be **involved in discussions** with professional support services, should be able to access the information and data which is kept about them, and needs to consider keeping a 'transition log' to record what they have done. A transition log is seen as a very practical and beneficial way of recording what has changed and the growth opportunities which it has presented.

However, there was disagreement between participants as to whether **sanctions** should be used as a means of motivating an individual to approach and manage the process of transition positively. Participants considered the 'carrot and stick' approach to transition which proposes withdrawal of benefits or 'personal sanctions' should an individual not be willing to embrace change with mixed feelings. Some raised issues with the language being used: 'consequences' or 'conditionality' were seen more positively than 'sanctions,' but others felt that "the term doesn't make the outcomes any better." Many participants questioned whether individuals undergoing a transition should be 'punished' for not being able to manage or cope effectively, however a counter argument was made by another participant based on employment data where "sanctions have shown to be effective among job seekers."

In terms of support, the use of volunteers to create **new social networks** was mentioned, role models of people who have successfully transitioned, or mentors. Such approaches can provide coaching and counselling as well as education and training ahead of a transition taking place, with the support provided based on 'real-life' experience.

Participants agreed that overall better **targeting and identification of people** in need was necessary. What came out of the discussions however is the difference that exists between planned and unplanned transitions, and the different types of support and services that are required in each situation. Our discussions focused on matching services to potential delivery organisations in three situations: retirement, career change and health. The insight from this analysis is as follows:

- (i) Public sector has a big role to play. Early education and training about transition and the need for resilience were clearly noted by participants; it is important that this is considered early and be included in the school curriculum from a young age. Targeted education, such as of GPs or in the workplace was also deemed important in terms of awareness-raising about life transition. Services such as job centres could also provide 'transition champions'; individuals who can provide "transition awareness management" and deliver a much better response to the needs of those individuals.
- (ii) Government more generally is also considered important in terms of ensuring that appropriate and trusted information is available, both online and off-line. However, participants also noted that such information should be available "bit by bit" so as to not overwhelm people. The government should also be responsible for ensuring people's financial security through pension plans and state pension.
- (iii) In terms of **employers**, participants noted that they could provide several types of support: a regular career review for people nearing retirement or moving in to more flexible worktime. Employers should also have greater awareness of the changing market and not be afraid to "bring medical complexity in the workplace." This can be achieved by raising awareness in medical conditions and being trained to having greater confidence in managing a workforce that has medical conditions.

(iv) With regards to wider private sector support this can include career coaches as well as electronic and digital support. Third sector can also help by providing information, support groups, providing planning help and advice and offering volunteering opportunities.

Insights and Conclusions

Throughout the discussions, we were conscious that there was a wide range of sectors represented, and that the outcomes of the consultation would bring general understanding, rather than specific recommendations on how transition should be managed or what components might lead a life transition to be more successful.

The consultation aimed to bring out learnings that other sectors can apply to one another about how transition can be dealt with differently, and a number of overarching conclusions were developed by participants, including:

- In terms of individual transitions, it is important to emphasise the need for planning, having access to information, accepting that transitioning means working with a 'fear of failure', understanding that transition is not a linear process, and giving yourself time and space to adjust and reflect.
- Family and friends can help with a transition through better understanding of what transition is, acknowledgement of the process, and providing personal support. However, there should also be understanding that family and friends also need support themselves, and that they may not always be present or beneficial for the individual in transition.
- General barriers for services and support providers to overcome include increasing access points, out-of-hours contacts, individual planning and building general societal awareness on the matter of transitions.
- The term 'transition' is seen as carrying negative connotations, and should be re-considered as a general descriptor. More importantly, participants questioned what was meant by a transition: can any sort of change be called a transition? What differentiates transitions between sectors? Is it a life-changing event, or a series of smaller scale changes that occur throughout a person's life?
- The notion of 'identity' is an important factor to consider. Sometimes work is tied so closely to an individual's identity that when you try to separate both, everything is tied to the change: "people's identities are too taken up by work which is a big risk." The role for family, friends and the wider network is to help an individual to have an identity and sense of self outside of one aspect of their life was considered crucial to success.
- Resilience was also a common theme raised through the discussions. Teaching what this means and developing it from childhood is essential, but also learning from experience was also stressed by participants. The importance of learning from past experience was a key theme identified for us all regardless of age: "ageing is no place for sissies", and more should be done to learn from older generations and their experiences.

- Too much responsibility can be placed on individuals to succeed through a transition, and this can be harmful. There needs to be recognition that while individuals have a role to play in their transition, the onus is also on the wider support network and services to help support the individual and this is not a binary, "pass or fail" situation.
- Transitions require both practical (for example money and time) and non-material (for example emotional support and a close network) resources. Provision of both does not only rely on the individual or on their network of relationships, but more widely on society and the public and private sector there should be a "safety net" for the individual if they do not manage on their own.
- It is possible to learn from other sectors, but we must recognise that there are also some significant differences in management around certain types of transition, particularly in terms of planned versus unplanned transition. However, no matter whether one can plan a transition or not, transitions are rarely thought about significantly in advance, and such planning can be helpful.
- The notion of 'success' was raised frequently by participants throughout the consultation. The perceptions of 'success' and 'failure' are often closely tied to how a transition is viewed externally. In that respect, failure is defined by societal norms, which should be prompted to change if they are damaging to individuals.

Participants

Name	Organisation	Role
Ms Emma Atkins	Dame Kelly Holmes Trust	Chief Executive
Mr Andrew Barnett	Calouste Gulbenkian Foundation	Director
Ms Margaret Bolton	Calouste Gulbenkian Foundation (UK Branch)	Head of Dissemination and Learning
Mr Tim Cairns	Career Transition Partnership	Head of Transition
Mr Mark Carden	Researcher to Reader Conference	Chairman & Director
Dr Anna Dixson	Centre for Ageing Better	Chief Executive
Ms Gemma Doyle	(Former MP)	Political Consultant
Mr Sam Freston	Forces in Mind Trust	Assistant Head of Policy
Ms Jane Fylan	British Athletics (UK Athletics Ltd)	Welfare Lead
Ms Sarah Grand-Clement	RAND Europe	Research Assistant
Dr Savas Hadjipavlou	Justice Episteme	Director
Ms Joanne Harding	Shropshire Doctors Co-Operative Ltd	Director of Transformation
Mr Edward Harris	Directorate Children and Young People, Ministry of Defence	Senior Education Officer
Ms Sally Harvey	RNIB	Acting Chief Executive
Mr Mark Knight	Department for Work and Pensions	DWP Armed Forces lead
Mr Andy Langford	Cruse Bereavement Care	Director of Operations
Air Vice-Marshal Ray Lock	Forces in Mind Trust	Chief Executive
Mrs Meri Mayhew	Forces in Mind Trust	Head of Policy
Mr Brian Parry	Associate	St George's House
Mr Mark Sanderson	Suffolk Fire and Rescue Service	Deputy Chief Fire Officer
Air Vice-Marshal Tony Stables	Forces in Mind Trust	Chairman
Ms Jane Vass	Age UK	Director of Policy and Research
Ms Frances West	Help for Heroes	National Head of Welfare
Mr Dai Williams	Eos Career Services	Chartered Occupational Psychologist

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