Contents

Acknowledgements ............................................................................................................ ix
The Authors ....................................................................................................................... x
Abbreviations .................................................................................................................. xi
Summary ........................................................................................................................... 1

1 Introduction and background ...................................................................................... 15
  1.1 Background to the Partnership Fund .................................................................. 15
  1.2 Study aims and objectives ................................................................................. 17
  1.3 Study design ......................................................................................................... 18
  1.4 Qualitative case studies ..................................................................................... 18
     1.4.1 Sample design ............................................................................................... 18
     1.4.2 Sample selection and recruitment ............................................................... 21
     1.4.3 Conduct .......................................................................................................... 25
     1.4.4 Analysis .......................................................................................................... 27
  1.5 Telephone survey .................................................................................................. 27
     1.5.1 Sample design ............................................................................................... 27
     1.5.2 Sample recruitment ....................................................................................... 27
     1.5.3 Conduct .......................................................................................................... 29
     1.5.4 Data processing and analysis ..... ................................................................. 30
  1.6 Coverage of this report ......................................................................................... 30

2 The context of older people's lives ............................................................................ 35
  2.1 The circumstances and needs of Partnership Fund customers ................. 35
7.3 Motivations for partnership working ................................................117
7.4 Factors facilitating effective partnership working .............................119
7.5 Joint working with the Pension Service Local Service ....................121
   7.5.1 Styles of joint working ......................................................121
   7.5.2 Factors underpinning relationships between funded projects and the Pension Service Local Service ...........124

8 Impact of the Partnership Fund on older people .........................................131
  8.1 The difficulty of assessing customer impact ......................................131
  8.2 Primary impacts ...............................................................................133
     8.2.1 Take-up of benefits ...........................................................134
     8.2.2 Access to services ..............................................................136
  8.3 Secondary impacts ...........................................................................138
  8.4 The significance of impact ...............................................................140

9 The organisational impact of the Partnership Fund .....................................145
  9.1 Outcomes for staff ..........................................................................146
     9.1.1 The acquisition/development of benefit-related skills ...........147
     9.1.2 The acquisition/development of ‘soft’ skills .........................148
     9.1.3 The development of expertise in delivering services to older people .................................................................149
     9.1.4 Personal fulfilment ................................................................150
  9.2 Outcomes for the (parent) organisation ...........................................151
  9.3 Outcomes for the local service network ...........................................153
  9.4 The legacy of the Partnership Fund ..................................................155

10 Conclusion ..............................................................................................157
  10.1 Funding innovative services for older people ...............................157
  10.2 Targeting older people and delivering services to them ...............158
  10.3 The importance of a holistic approach to meeting the needs of older people .................................................................159
  10.4 Partnership working between services for older people ..........160
  10.5 The value of the Partnership Fund ..................................................161
Figure 8.1  Impacts of the Partnership Fund................................................134
Figure 9.1  Organisational impact of the Partnership Fund..........................146
Figure 9.2  Overview of outcomes for project staff .....................................149
Figure 9.3  Overview of outcomes for the parent organisation.......................152
Figure 9.4  Overview of outcomes the local service network.........................154
Acknowledgements

The authors would like to thank Vicky Petrie, Robert Lilly and Clare Talbot at the Department for Work and Pensions (DWP) for their assistance with this evaluation. They are also grateful to Gwen Wolf, Leanne Bewick, Duncan Gray and Helen English at DWP, and Nigel Ashplant and David Page at The Pension Service for their input and advice.

At the National Centre for Social Research (NatCen) we would like to thank Naomi Day, Alice Mowlam, Jenny Graham and Martha Warrener for their assistance in analysing the qualitative data and Riikka Hallikainen and Andie Brown for providing administrative support.

We are also indebted to all the people who participated in the evaluation, particularly staff at participating qualitative case study projects who, as well as participating in the evaluation, assisted greatly with the recruitment of participants. Our thanks also go to the older people interviewed who gave up their time to share their experiences with us. Without these contributions, this work would not have been possible.
The Authors

Meg Callanan is a Research Assistant in the Qualitative Research Unit. She joined the Unit in 2005 and has since worked on studies across a variety of social policy areas including welfare reform, and transport.

Joanne Maher has worked as a Senior Researcher in the Quantitative Research Department since September 2004. During this time her main responsibility has been the day-to-day management of the Family Resources Survey, which National Centre for Social Research (NatCen) conducts jointly with the Office for National Statistics.

William O’Connor is Deputy Director of the Qualitative Research Unit. He specialises in cross-sectional and longitudinal qualitative research studies in a wide variety of social policy areas, with a particular interest in benefits and welfare. He teaches widely on qualitative research and is pioneering a new computerised method of analysis called Framework.

Rosalind Tennant is a Senior Researcher in the Qualitative Research Unit. She joined the Unit in 2004 and has since worked on studies across a variety of social policy areas including labour market transitions, cohabitation and legal reform and, most recently, the abuse and mistreatment of older people.

Stephen Webster is a Research Director in the Qualitative Research Unit. He joined NatCen in 2005, having worked as a Senior Research Psychologist for HM Prison Service conducting qualitative and quantitative evaluations of the Sexual Offender and Domestic Violence Treatment Programmes. His recent work spans a range of policy areas including drug treatment, transport and childcare.
## Abbreviations

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA</td>
<td>Attendance Allowance</td>
</tr>
<tr>
<td>BME</td>
<td>Black and Minority Ethnic</td>
</tr>
<tr>
<td>CA</td>
<td>Carer’s Allowance</td>
</tr>
<tr>
<td>CTB</td>
<td>Council Tax Benefit</td>
</tr>
<tr>
<td>Defra</td>
<td>Department for Environment, Food and Rural Affairs</td>
</tr>
<tr>
<td>DLA</td>
<td>Disability Living Allowance</td>
</tr>
<tr>
<td>DPA</td>
<td>Data Protection Act</td>
</tr>
<tr>
<td>DWP</td>
<td>Department for Work and Pensions</td>
</tr>
<tr>
<td>HB</td>
<td>Housing Benefit</td>
</tr>
<tr>
<td>NatCen</td>
<td>National Centre for Social Research</td>
</tr>
<tr>
<td>PLM</td>
<td>Partnership Liaison Manager</td>
</tr>
<tr>
<td>PSLS</td>
<td>Pension Service Local Service</td>
</tr>
</tbody>
</table>
Summary

Chapter 1 – Introduction and research design

This report presents the findings of the evaluation of the Pension Service Partnership Fund that aimed to examine the implementation, delivery and outcomes of the Fund, and contribute to a better understanding of ‘good practice’ in providing services for older people. The research was conducted by the National Centre for Social Research (NatCen) and commissioned by the Department for Work and Pensions (DWP).

Background

The Partnership Fund formed part of the Government’s strategy to tackle pensioner poverty by ensuring that pensioners claim the benefits they are entitled to and access the services they require. It aimed to develop cohesive networks of services for older people by encouraging joint working between partners and financed a diverse range of local and national organisations to undertake individual projects to improve the take-up of benefits, giving particular attention to the ‘hard-to-reach’.

Evaluation design and conduct

The evaluation had two components: qualitative case studies and a quantitative survey. The qualitative component involved in-depth case studies of 13 purposively selected projects. Using in-depth interviews and observations of project activity, evidence was collected from project staff, relevant employees of their partner organisations, including the Pension Service Local Service (PSLS), and their customers to explore multiple perspectives on project set-up, delivery and outcomes. Respondents were sampled and recruited via staff at each of the case study projects and, for PSLS staff, via lists provided by DWP. Interviews with customers generally took place in their homes and those with staff took place at their offices. Fieldwork took place between November 2005 and November 2006.
The quantitative component of the evaluation comprised a telephone survey of all projects funded by the Partnership Fund. All 173 schemes were invited to participate and 167 interviews were achieved between June and September 2006. Analysis of the additional impact the Partnership Fund initiatives made on the actual take-up of welfare benefits was beyond the scope of this evaluation.

In-depth interviews were analysed using ‘Framework’, a thematic content analysis method for analysing qualitative data. Descriptive analyses of the survey data were produced using SPSS.

**The coverage of the report**

The report is divided into three broad sections. The first deals with the context and foundations of the Partnership Fund. The second deals with project activity including targeting, engagement and partnership working. The final section draws together findings on the impact of the Fund on older people and the organisations that worked with them.

**Chapter 2 – The context of older people’s lives**

**Customer need**

Customers described a diverse range of needs relating to finances but also health, housing, caring responsibilities, and social networks. The range and complexity of these needs affected Partnership Fund projects, impacting on the services they offered, the ways they targeted customers, and the delivery methods they used.

**Barriers to benefits take-up**

The findings from the study echoed the barriers identified by previous research into benefit take-up among older people and also identified a range of other difficulties for older people. These related to difficulties understanding and navigating the benefits system, including a lack of clarity around eligibility, the perceived complexity of making benefit applications, and the stigma of benefit receipt. Older people also revealed individual concerns about poor levels of literacy, poor health, caring responsibilities, communication difficulties and a lack of transport.

**The interaction of needs and barriers**

Barriers to take-up of benefits were complex, and it was not uncommon for one customer to refer to multiple barriers and needs. Different groups of older people experienced different barriers to a greater or lesser degree. To meet these needs and successfully increase take-up of benefits and improve access to services, projects had to tailor their support to the individual customer.
Chapter 3 – The evaluation framework for the Partnership Fund

One-hundred and seventy-three different Partnership Fund projects were established, each with a diverse range of circumstances and ways of working, and this presented significant challenges to the design and conduct of the evaluation.

Every programme designed and implemented to encourage any form of social change can be said have a theory of change related to it. Theories of change identify and describe the foundations, processes and outcomes necessary for a programme to achieve its desired goals, and consider the inter-relationship between them.

Chapter 3 outlines a detailed theory of change for the Partnership Fund. The key benefit for exploring the projects in this way is that the model shows the range of circumstances, methods and outcomes that are relevant to each of the projects. The model is also able to describe how the range of foundations, processes and outcomes work together in different ways for different projects.

Chapter 4 – The foundations of the Partnership Fund

The foundations of the Partnership Fund are the four key building blocks that underpinned what projects are able to offer older people and how they are subsequently engaged. These encompassed the funding available to projects to work with older people, an organisation’s vision for how it will it achieve its desired outcomes, its experience and skill at providing benefits and social care assistance, and its location.

Funding

Of the four building blocks, funding is pivotal since it has the potential to influence each of the others, and this can impact on what is ultimately offered and achieved. Three key aspects of the funding process influenced a project’s capacity to deliver services to older people. The first is the range and extent of a project’s existing funding sources. This had fundamental implications for the stability of a project. That projects were not operating with similar resource levels also affected their relative capacity to generate further funding, demonstrated by accounts of how the Partnership Fund funding application was approached. The amount of money received from the Partnership Fund and the duration of it was also affected and this in turn had deleterious influences on the recruitment and retention of staff, and projects’ ability to test and refine their aims and methods. There was also evidence to suggest that those with a stable funding base were more equipped to use the funds generated by the Partnership Fund to innovate and develop services, whereas those projects with more unstable financial circumstances used the funds, in part, to sustain their very existence.
Vision
An organisation's plans for how it achieved the take-up of benefits by older people is another crucial foundation of project delivery. Two aspects were important: the nature and extent of strategy planning within organisations and the objectives projects set to achieve their outcomes. Organisations had varied capacity to think and act strategically. Some described having a range of plans and aims for the take-up of benefits, whereas others provided little evidence of planning. The extent of strategy planning had a clear impact on the provision of benefits and social care services in the way it impacted on the development of the project profile and how staff were appointed to strategic roles. Projects also varied considerably in how they described their objectives. A blend of both organisational and methodological objectives clearly provided the most solid foundation on which to increase the take-up of benefits and social care services. However, for some projects, there was little discussion of how objectives would be achieved whereas amongst others there was a clear rationale for the Partnership Fund service with multiple objectives identified.

Expertise
The level of experience, acquired know-how and skill within the organisation was identified as the third foundation. Underpinning this was whether organisations were drawing on established expertise in working with older people developed before the Partnership Fund. Those that were working with older people for the first time had to learn about their client group and effective strategies for engaging them while they were delivering the project. Start-up delays were particularly pertinent to projects using service delivery methods for the first time and demonstrate how methodological innovation, forward planning and expertise is an effective combination to increase the take-up of benefits. The development, publishing and distribution of marketing materials were another cause of delay. The experience of staff recruited to the projects, specifically the range of skills staff had developed working with the general population and their awareness of and motivation to address the specific needs of older people, also impacted on how services were delivered. Finally, whether organisations recognised the challenging nature of the work project staff were doing was also important. This manifested in the nature and extent of the support projects had in place to offer their staff to help them carry out their role, which in turn has a bearing on motivation and ultimately staff retention.

Environment
The final foundation of the Partnership Fund was environment. This influenced what a project could provide in three ways. First, where projects were situated in locations that were not well served by public transport or the customer was housebound, there was a need to diversify the methods of project delivery. Thus, home visits played a key role. For projects located in rural and mixed settings, project workers had to have access to a car. Second, how unique a project was had
important implications for its profile and ultimate appeal to older people within the local area. Some projects were unique because of where they were based. This had a key bearing on project outcomes as there were fewer concerns about losing potential customers to organisations providing similar services. Projects that were providing services to a specific group of older people were unique in a different way though gained the same monopoly in local provision. Thirdly, those projects delivering services from multiple venues had a greater capacity to reach older people. Furthermore, the condition or suitability of the setting influenced the quality of the encounter between project worker and customer.

Chapter 5 – Targeting potential customers

Ways of targeting

Projects described six broad methods of targeting older people:

• **using existing databases to make contact with older people** – at their most basic, these were lists of older people's names and addresses, sometimes including details of benefits claimed, that projects utilised in order to contact potential customers either by letter, leaflet, telephone or a combination of all of these;

• **distributing printed materials (such as leaflets or posters)** – this approach included advertising in newsletters and newspapers, on prescriptions, posters, leaflets, and within letters to potential customers;

• **engaging the local and specialist media**, for example advertising in community publications that were sometimes delivered to every address in the locality;

• **transmitting details of the service through word of mouth**, via friends or family of project customers. Project staff were almost unanimous in highlighting the value of this approach as the only way of gaining such a strong seal of approval and credibility;

• **undertaking community outreach** – this involved the project, and sometimes other agencies, delivering services at a range of venues including outside their offices, for example luncheon clubs, libraries and health centres;

• **using the telephone** to introduce the project and explain what it could offer. Sometimes advice was also given via the telephone.

The first four of these methods were used just to target customers. The last two were used by projects to target customers and deliver benefits and social care services simultaneously. The degree to which each of these methods was used by an individual project differed according to the characteristics of the projects and the needs presented by their customers. The evidence suggests that the Partnership Fund enabled organisations to utilise targeting methods and work with people in a way that would otherwise have been beyond the scope or capacity of their parent organisation.
Intensity of targeting

It was rare for projects to use specific targeting approaches in isolation. The key advantage of combining multiple targeting methods was that they created a momentum or intensity to this aspect of the targeting process. Building one targeting approach on the impact of a previous method of contact created a level of intensity that had a clear bearing on the success of these methods in encouraging older people to engage with project staff. Where an intensive approach was evident, a key characteristic was that projects were mixing indirect targeting methods, such as leaflets and letters, with approaches that involved direct contact with the potential customer (like a roadshow encounter or telephone call). Together, this mix of indirect and direct methods created a momentum that communicated to customers that the project was very serious in wanting to help them increase their financial position. In turn, this helped to engage customers.

How targeting methods evolved

A key feature of projects that work innovatively with hard to reach older people is that there is a flexibility of service delivery approach that allows targeting methods to develop and evolve according to customer need. This reflected a pragmatic approach to targeting among Partnership Fund initiatives, where if something did not work, project staff would move on and look at another approach. Similarly, targeting tools were adjusted and new approaches added throughout the Partnership Fund programme in line with how the project developed their knowledge of the target group or the locality. The extent of an organisation’s capacity also affected a project’s targeting approach. In this respect, the resources available to projects, the expertise of staff employed and the extent of forward planning that could occur before the Partnership Fund project all had a bearing on the degree to which projects could be responsive in their targeting of older people.

Chapter 6 – Delivering project services

There was variation in the mix of support offered to older people by the projects. Some projects provided benefits advice only, whereas others combined this, to a greater or lesser extent, with access to social care services that aimed to increase a customer’s quality of life. The reasons some projects focused on benefits during the Partnership Fund programme and why others provided a more holistic service were related to the expertise of the project, its understanding of customer need, and the project’s understanding of what it could offer. Projects delivered this benefit and social care assistance in a diverse array of places: their own organisation’s venues, those of partners, and customers’ homes.

Motivations and expectations

Older people were motivated to become involved with funded projects for three main reasons: to gain financial support; to maintain their independence, for
example by having mobility aids fitted in their home; and, because they were simply curious about what the project could offer them. Customers however had low expectations of projects and were reticent to work with service providers, therefore staff had much to do if they were to be successful in engaging them and convincing them to work with the project.

There were six stages of how staff worked with older people to deliver benefits and social care support that had a bearing on the actual take-up of these services. These were: explaining to customers how the process would take place; structuring customers’ expectations about what the project could do and how long the process may take; assessing the customer’s need for benefits and social care services; completing the benefits application form with customers; sign-posting or referring customers to other services where a need was identified; following up the customer once the application was submitted.

Introduction and explanations

The opening stages of a customer’s encounter with the project were key to how the remainder of the meeting went. Effective staff introductions were determined by the language and style of the staff, where the worker placed themselves in relation to the customer, techniques used to hold the customer’s attention, and how eligibility was explained.

Structuring expectations

Being fair and open with customers by not giving people false hope was seen as particularly important where some customers had been away from official service provision for some time. Staff aimed to provide the customer a clear map of the work that would be involved in meeting their needs, give customers a sense of how long claiming benefits or accessing social care services may take, and provide them with a realistic assessment of the likely outcome.

Assessing customer need

As well as structuring expectations about the encounter, staff used early exchanges with customers to understand the range and extent of their needs. In order to assess the older person’s circumstances and requirements, project staff used probing, respectful questions and self-disclosure. The setting, in which, some services were provided was a key way of ascertaining the current circumstances of customers. Home visits were a private and comfortable place in which customers felt comfortable disclosing details about their personal circumstances but they also allowed for an accurate assessment of a customer’s mobility. Staff also described sequencing the provision of benefits and social care help in a particular way in order to maximise the impact of these services for the customer.

Benefit application

Project staff were clear that tailoring their approach to the customer was vital if the information was to be gathered from them in a respectful, collaborative
manner. A project worker's ability to develop the customer's trust and discretion was important for ensuring the successful completion of a benefit application. That customers felt that they could trust the project worker to do a good job on their behalf contributed to them feeling confident about sharing information. Project staff used a variety of different approaches when completing different benefit forms, ranging from the light-hearted to the more serious. The time customers needed to absorb and make sense of the facts and options presented, and their literacy or numeracy needs were also acknowledged.

**Direction to appropriate services**

Assessing the customer for social care needs that could be met by their own or other organisations was a key part of providing a holistic service. Sign-posting older people to other organisations was one way in which customers were directed towards social care provision. Other projects simply provided customers with written material about the project. Getting consent for and arranging referrals to other organisations was a more active and supported way in which customers were directed to other services. The advantage of this approach was that it enabled staff to get a sense, both verbally and non-verbally, of the customer's interest or willingness to be referred.

**Customer follow-up**

Following-up customers was the final part of the service delivery process. This was important for reinforcing to the customer that the project was serious about trying to increase their access to benefits and social care service which further helped install customer confidence in the service. Projects followed-up customers by letter, phone call and in person in order to quickly ‘touch base’ with the project to either give them a progress update about a benefits application or ask the customer if they had received a letter telling them the result of the claim.

**Chapter 7 – Partnership working**

Partnership working was evident across more than three-quarters of the projects surveyed and projects that reported partnership working mentioned a wide variety of partner organisations.

**Styles of partnership working**

Organisations understood the concept of partnership quite differently and this was reflected in the way they conducted their relationships. Various ways of working in partnership were evident. Projects were not limited to a single style and a single relationship between partners could incorporate various styles of working at different points in their working relationship. Individual projects also employed different styles to suit the relationship desired with their different partners. The following arrangements for working together were described by projects and partners:
• joint service delivery, characterised by partners assuming responsibility for delivering different elements of the project’s service-offer or project staff and partners conducting customer appointments together;

• joint outreach, where partners established and ran joint outreach events, or where they attended each others’ established outreach events;

• sharing customer lists, where partners shared information about their customers’ benefit history, contact details and other personal information to facilitate the targeting of services;

• referrals, characterised by one-way or reciprocal arrangements between partners whereby customers were referred between services to address different needs; and

• information sharing and training, where partners shared information and updates about benefits, their services, learning from delivering services to older people; they also delivered training in benefits and other skills.

The variety of arrangements for working together that projects and partners described were not very different from those in place before the Partnership Fund, however there was evidence that the Fund had encouraged partners to think more carefully about how they interacted with other organisations and reflect on the effectiveness of their arrangements.

**Motivations for partnership working**

Projects and partners were motivated to work together for a number of reasons. It was hoped partnerships would help to maximise customer access to services, help projects to gain access to more of their target customers or to allow services to focus on their ‘core’ service (and refer customers for other needs), thus enabling them to see a greater number of their target customers. Projects and their partners were also keen to work together to ensure that their services did not overlap. Others hoped that working with another organisation might improve their image, especially local authorities who felt that working with local voluntary organisations made their service appear more accessible. Finally, the Partnership Fund itself was the catalyst for the development of certain partnerships and staff from some projects cited that the requirement for partnership activity within the funding guidelines made them seek out specific kinds of partners.

**The effectiveness of partnership working**

The effectiveness of partnership working was underpinned by several factors: the appropriateness of the style of partnership working adopted; the clarity and synchronicity of partners’ motivations for working together; partners’ understanding of each other’s services; the local context of partnership activity; and, the profile of partner organisations.
Joint working with the Pension Service Local Service

Relationships between the PSLS and projects shared some of the same characteristics as those between funded projects and other types of partner organisations and, likewise, a variety of arrangements existed for working together, such as Joint Teams and Alternative Offices. The relationship between funded projects and the PSLS varied across the case study areas. A number of factors explain this. These encompass: the historical relationship between the Pension Service and funded projects; the recruitment of PLS staff by the Partnership Fund project; the degree of trust projects had in the motivation of the PSLS; Partnership Liaison Manager’s (PLMs’) understanding of their role within the Partnership Fund; the way funded projects understood the role of the PSLS in supporting their activities; and, whether funded projects and the PSLS saw each other as a partner or a competitor.

Chapter 8 – Impact of the Partnership Fund on older people

The difficulty of assessing customer impact

There were a number of important challenges to assessing the impact of the Partnership Fund on customers of projects. Irrespective of whether the funded project constituted a new service or an extension of an existing arrangement, it was difficult to disentangle outcomes that were attributable to Partnership Fund activity solely and outcomes that might result from usual contact older people had with the parent organisation. There were also differences in the degree of clarity customers had about their experience of the service and, consequently, of the outcomes achieved.

The outcomes described by customers interviewed as part of the case studies were almost wholly positive. This was true even when the overall benefit gained could be perceived to be moderate or low and where there was evidence of unmet need. There are two possible explanations for older people’s emphasis on the positive. The first is methodological. The approach to sampling customers meant that projects played a role in selection, and customers themselves were required to opt-in to the research. As a result, there was potential for customers with the most positive experiences to be ‘cherry picked’ by staff or that more positive customers would opt-in. The second explanation is that older people’s expectations of public services are generally low and, in this context, even moderately positive outcomes were viewed with surprise and satisfaction.

The nature of outcomes achieved

Outcomes for customers can be divided into primary and secondary impacts. Primary impacts relate to the immediate impact of taking-up of benefits and accessing services. The range of benefits customers received help and support applying for varied from project to project. They included Pension Credit, Attendance Allowance, Carers Allowance, Disability Living Allowance, Housing Benefit and Council Tax Benefit. Successful applications for these benefits had a
range of immediate impacts on customers. These included improved awareness of benefits eligibility, income maximisation, and reductions in debt. Combined, these impacts enhanced financial security, laying the foundation for further secondary impacts on other aspects of customers’ lives including health, social networks, housing, levels of independence, and emotional and psychological wellbeing.

The significance of impact

The significance of these outcomes varied from customer to customer. In some cases, contact with Partnership Fund projects had a tremendous impact, while in others, the impact was minimal or there was evidence of unmet need. Low impact occurred when customers receiving help with applying for benefits had their applications turned down or when the effect of a successful benefit application was matched by corresponding reductions in others. The level of impact was also determined by the level of individual customer need, where vulnerable customers with the highest levels of need experienced the greatest impacts because they had the most to gain. Conversely, where the needs of customers were less severe, the support they received appeared to hold less significance for them. Finally, the extent to which projects effectively met customer needs through appropriate support is also key. Where customers were vulnerable and had high levels of need that were not met effectively, this resulted in minimal impact from the programme.

It was apparent in some of the interviews with customers that projects did not always adequately meet the full set of their needs. From the accounts of the older people it appeared that this occurred where needs were adequately articulated but not addressed by a project worker. Alternatively, it also occurred when the customer perceived themselves or their needs to be outside the scope of the project, and therefore did not express or allude to them in their encounter with the project worker. This highlights the importance of a holistic assessment of need by project workers. The inability to meet expressed need may reflect the limitations on what certain projects could realistically provide, or the sheer complexity of need presented by some customers.

Chapter 9 – The organisational impact of the Partnership Fund

The impact of the Partnership Fund is not limited to outcomes for customers and there is evidence that it has effected change on the work and outlook of project staff, in the funded project’s parent organisation, and in the network of local services for older people. These outcomes are important because of the contribution they make to older people’s lives. They are important also in their own right because they indicate the impact of the Fund on approaches to delivering services to older people. Outcomes for staff, the organisation and the local community are interrelated in that one set of outcomes in turn can contribute to another. Thus, the impact of the Fund on staff contributes to the impact on the organisation. Both have implications for the outcomes for the local service network.
Outcomes for staff, the parent organisation and the local service

Outcomes from the Partnership Fund for project staff were evident in the development of benefit-related and ‘soft’ skills, the development of expertise in delivering services to older people, and personal fulfilment. Outcomes were predominantly positive though staff did acknowledge negative impacts on their emotional wellbeing when their work was emotionally distressing or tiring. The parent organisation benefited from the Partnership Fund in the way its service scope was enabled to broaden or narrow in focus, in changes to the range of practices available to and employed by the organisation, and in the enhancement of its profile among customers and local services. Finally, outcomes for the local service network were evident in the strengthening and extension of existing service networks, the stimulation of competition, and changes in the demand for different services and how they were paid for.

The legacy of the Partnership Fund

A further aim of the Partnership Fund was to generate good practice that would survive after it came to an end. An important component of this legacy was the range of skills and expertise in providing services to older people acquired by project staff. The impacts identified for the Partnership Fund project parent organisation are also important because they signify the development of services for older people upon which future initiatives can be modelled. Similarly, some of the outcomes identified for the local service network could also feasibly continue post-funding. PLMs however held mixed views about the success of the Fund in meeting this aim. Where they were positive, PLMs emphasised the advantages of being able to try out new ways of working locally and new ways of engaging older people. Where they were negative, they highlighted how the discontinuation of these pilot projects might ‘create’ future gaps by stimulating a demand for a service that could not be continued, or argued that the local service could have achieved the same outcomes more quickly and resource-efficiently.

Chapter 10 – Conclusions

The findings indicate that local services aimed at working with older people face the same challenges experienced by many other community-based organisations.

The stability of funding is key to these organisations. Smaller voluntary organisations are particularly vulnerable because staff have less experience of completing applications for funding and more modest expectations of what they might receive. The research indicates that more could be done to build their capacity to apply for such funding. Creating a more stable funding base for the work that these organisations carry out should also be a priority. The time-limited nature of funding can mean that organisations invest continuous effort in supporting these much needed services, effort that could go into the development and delivery of more innovative and joined-up services for older people.
The evaluation has highlighted a rich tapestry of methods for engaging older people in local services, whatever the target group. There are very consistent messages about what works in delivering services to older people, including where work with the older person takes place, and activities such as community outreach events and home visits. Much of the ways of targeting and engaging customers uncovered by the evaluation stress the importance of a flexible responsive approach that meets the unique needs of each individual older person. They highlight the importance of having a ‘tool-kit’ of resources. The time taken to implement them effectively should not be underestimated, but there is evidence to suggest that the outlay of resources in the short term could off-set the need to expend other resources in the future.

The application of a holistic approach by certain projects has highlighted how important this approach is to meeting the diverse range of needs that older people present. This finding offers strong support for policies that aim to bridge the gap between local services for older people, such as the Pension Service LinkAge programme. What is key is that such services work together to facilitate appropriate referrals between them to ensure all customer needs are met.

The evaluation has shown the value of local partnership working, for example sharing customer information, and highlighted a number of issues that underpinned effective partnership relationships. However, it also reflected the difficulties of creating partnerships in local communities and the inconsistent role played by the PSLS in engaging with them. Where there was genuine partnership working between the PSLS and funded projects, there was admiration for the expertise of those in the Local Service and appreciation of how this could help local projects to better help older people.

The findings from this study have illuminated the beneficial ways in which funded projects have developed services for older people that can overcome barriers. It has also demonstrated the important positive impact on the older person where this is achieved. Moreover, it has highlighted positive outcomes for local organisations and the people who work in them. The nature of this second set of outcomes suggests that the investment made in the Partnership Fund will continue.
1 Introduction and background

This report presents the findings of the evaluation of the Pension Service Partnership Fund. The research was conducted by the National Centre for Social Research (NatCen) and commissioned by the Department for Work and Pensions (DWP). The aim of the evaluation was to examine the implementation, delivery and outcomes of the Fund, and to contribute to a better understanding of ‘good practice’ in providing services for older people.

The findings generated by the research will initiate further cross department study, feeding into the Transforming Government for Older People and LinkAge Plus strategies. Furthermore the research will help formulate a Good Practice Guide that the Department has committed to publishing before the end of 2007.

A series of feedback and consultation events with all Partnership Fund projects will be held over the summer of 2007. These events will assist in the capture of successful approaches that may be replicated elsewhere. The learning from these events will be included in the Good Practice Guide.

This chapter outlines the research and policy background for the study, the aims and objectives of the evaluation, and the research design and methodology employed.

1.1 Background to the Partnership Fund

Britain is an ageing society and it is estimated that the number of people aged 65 and over will increase by 78 per cent over the next 50 years (Pension Commission, 2004, 4). In 2005, the Government published ‘Opportunity Age: Meeting the challenges of ageing in the 21st Century’ setting out their proposals for managing this demographic change, focusing on promoting independence and ensuring a good quality of life for people as they grow older. At the heart of this strategy is a commitment to tackling pensioner poverty and improving access to services (DWP, 2005b).
Measures to tackle these issues are particularly pressing in light of research evidence suggesting that, despite progress in recent years, 1.8 million pensioners are living in relative poverty (NAO, 2006, 9) and 1.2 million pensioners are socially excluded on three or more indicators of social exclusion (SEU, 2006, 19). Against this backdrop, tackling pensioner poverty and, in particular non take-up of benefits, has become a key focus of the DWP who are committed to a Public Service Agreement to increase the take-up of Pension Credit to 3.2 million households by 2008.

Research that has explored the provision of benefits and services to older people has identified a range of barriers that must be addressed if pensioner poverty is to be tackled successfully. However, in 2002, a report by the National Audit Office concluded that, at that time, there was little evidence of systematic learning from good practice in relation to effective ways of improving take-up of benefits (NAO, 2002, 7). To tackle pensioner poverty, it called for The Pension Service to work in partnership with other agencies. They also argued that take-up could be increased by ‘...more systematic and focused application of best practice’ (NAO, 2002, 2). In the past few years, the Pension Service has implemented a number of policies aimed at joining-up services and improving partnership working. Alternative Offices have been developed with local voluntary organisations, enabling them to take claims for benefits and verify supporting documentation without the need for the documents to be seen by the PSLS. They have also implemented Joint Teams, working with Local Authorities and voluntary organisations in an effort to share data and create a seamless service for pensioners (DWP, 2005a, 62-63). LinkAge Plus, which is being piloted in eight areas, is designed so that people over 50 have access to a range of services. These measures have sought to improve partner working with other agencies and it is within this context that the Partnership Fund has developed.

The Partnership Fund formed part of the Government’s strategy to ensure that pensioners claim the benefits they are entitled to and access the services they require. Like the others mentioned above it aimed to develop cohesive networks of services for older people by encouraging joint working between partners. The Fund financed a diverse range of local and national organisations to undertake individual projects to improve the take-up of benefits, such as Pension Credit and Attendance Allowance, amongst older people. It aimed to give particular attention to the ‘hard-to-reach’, such as older people with disabilities, carers, people from ethnic minorities and those who live in rural areas.

The aims of the Partnership Fund extended beyond benefits-related issues and encompass the take-up by older people of a wider range of services including those related to social services, care and wider quality of life. These broader aims sought to:

- promote the independence of older people;
- integrate joint working between partners;
- improve access to services for older people;
• gain a better understanding of older people’s needs in a specific community, region or country setting.

The Fund was administered by DWP who have contributed £13 million. The Department for Environment Food and Rural Affairs (Defra) were also key contributors to the Fund and have designated an additional £1.72m for initiatives that specifically target older people in deprived parts of rural England.

The Fund was announced in April 2004 by the DWP and applications invited from statutory and voluntary organisations throughout England, Scotland and Wales. 740 were received before the closing date at the end of June 2004. Applications were assessed according to a number of criteria including evidence of innovation in the nature of services offered or their delivery, the proposed initiative’s customer focus, and use of partnership working.

Following this selection process, the Fund identified 173 schemes. The majority were based within local community, voluntary and not for profit organisations but four national projects were also funded. One-hundred and twenty-four were funded for two years, most became operational on the 1 March 2005 and finished by the end of February 2007. A further 49 also commenced operation in 2005. 30 of these ran for 12 months, while the remaining 19 operated for between 15 and 18 months. There will be no renewal of the Fund, nor is it a pilot for any future initiative. Rather the scheme aimed to stimulate partnership working and encourage partners to learn from good practice such that any improvements to services for older people are maintained and built upon.

1.2 Study aims and objectives

This evaluation explored the experiences of customers, staff and partners of schemes funded by the Partnership Fund. Using robust qualitative and quantitative methods, it gathered a variety of stakeholder perspectives on the Fund and the services that it facilitated and aimed to offer key insights into best practice for delivering services and benefits to older people. The evaluation had six key objectives. These were to:

• assess the extent and type of services and support offered to older people;
• understand the key successes and difficulties in setting up and maintaining schemes;
• understand the barriers, problems and facilitators for schemes in achieving their objectives;
• explore stakeholders’ (customers, partners, staff, Local Service) experiences of and attitudes towards joint working;
• explore customers’ experience of accessing and using the schemes;
• assess how effective (selected) schemes are in meeting the needs of the customer.
1.3 Study design

The evaluation had two components designed to inform and complement each other. These were:

- qualitative case studies of selected projects;
- a quantitative survey of all projects.

The design and methodological approach for each are outlined below. Further details are available in the appended Technical Reports (see Appendices D and E).

DWP have carried out a separate monitoring exercise gathering data on a range of output measures including the number of benefit claims generated by Partnership Fund projects and their monetary value.

1.4 Qualitative case studies

The qualitative component involved in-depth case studies of 13 purposively selected projects. Using in-depth interviews and observations of project activity, the aim was to collect evidence from Partnership Fund project staff, relevant employees of their partner organisations and their customers to explore multiple perspectives on project set-up, delivery and outcomes.

1.4.1 Sample design

There were two considerations for designing the sample for the qualitative case study component of the evaluation: the overall case-study sample design; and, the units to be sampled within each case-study.

**Case study sample design**

The Department funded a preliminary scoping study in order to gather more information about the funded projects and this was used to inform the development of a robust qualitative case-study design. The scoping activity was carried out between June and August 2005. Details about this stage can be found in Appendix E.

The primary outcome of the scoping study was the identification of a set of key criteria upon which the final selection of case studies was based. These were: the type of ‘parent’ organization; environment; main customer audience; customer approach; delivery mechanism; and size. The diversity of all 173 Partnership Fund projects was mapped by according to these characteristics. A subset of 36 projects,

---

1 The ‘parent’ organisation refers to the organisation within which the Partnership Fund project is located. For example, where a project is located within the advice team at a local authority, its parent organisation is the local authority.
which mapped the diversity present in the overall 173 on these six characteristics, were then selected and the entire Partnership Fund application was reviewed for each.

Following this closer inspection of project aims and planned activities, 13 projects (12 local and one national) were purposively selected as the provisional group of projects to be included in the evaluation to reflect the diversity apparent across the 173 Fund projects. Two of the projects in this original selection subsequently withdrew from the evaluation. In one case, this was because limited staff resources made participation difficult and burdensome. The other project had concerns about contacting its customers, who had a specific disability, and gaining their informed consent. These schemes were replaced with two others that, as far as possible, shared the same key characteristics.

A brief description of the participating projects is given below. Project names have been changed to preserve their anonymity – individual projects will be referred to throughout the report in this way.

<table>
<thead>
<tr>
<th>Project A</th>
<th>Project B</th>
<th>Project C</th>
<th>Project D</th>
<th>Project E</th>
<th>Project F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project A is a benefits advice service delivered via a combination of community outreach, and office and home appointments. Its customers are primarily older people from local urban BME communities. Its parent organisation is a local advice service.</td>
<td>Project B provides benefits advice and delivers its service to a broad customer group primarily via home visits. The project is located in a rural area and operates from within the local branch of a national advice organisation.</td>
<td>Set within a large urban local authority, Project C delivers both benefits advice and a wider range of wellbeing services to older people from a number of distinct BME groups. Home visits and office appointments are both heavily used.</td>
<td>Project D is a holistic wellbeing service aimed at older people with drug, alcohol or substance abuse problems, who are homeless, or who have mental health difficulties. It is set within an urban area and is part of an organisation delivering wellbeing services to customers of all ages with similar problems.</td>
<td>The service offered by Project E focuses on benefits advice for older carers. It operates from within a local support service for carers of all ages in a predominantly rural area. Services are delivered by a variety of methods including home visits, office appointments and outreach sessions.</td>
<td>Project F also delivers benefits advice for older carers and operates from within a local support service for carers of all ages. It is located within an area that covers urban and rural areas. It provides benefits checks, assistance for claiming benefits and a range of other support services mainly via home visits.</td>
</tr>
</tbody>
</table>
Project G provides a benefits check service, and assistance and advice for specific benefits and has a broad customer focus. The project is located within a large urban local authority and undertakes a wide variety of outreach activities, home visits and some office appointments.

Focusing on delivering a range of wellbeing services to older people with mental health difficulties, Project H operates from a local mental health support organisation in a rural area. Its main delivery approach is home visits.

Project I delivers benefits advice to a older people from a specific BME group via weekly ‘surgeries’ at their offices and home visits. It is based within a local BME wellbeing service in an urban area.

The service offered by Project J concentrates on benefits checks and advice and is delivered primarily via home visits to a broad range of older customers. It is located within a local branch of a national advice service for older people and operates in a rural area.

Project K is set within a mixed urban and rural area and delivers benefits advice by home visits. Its customer focus is broad and includes any older person in the local area. The project is one of the services offered by a large local authority.

Providing benefits advice and support services to older people with a specific sensory impairment, Project L operates from within a national support service. The area in which it operates combines a mixture of urban and rural localities and it delivers its service via outreach activities, home visits and office drop-in sessions.

Project M also operates within a mixed urban and rural area and gives benefits advice to a broad range of older people. It is based within a local authority and its service focuses on outreach activities and home visits.

Within-case sample design

Within each case study, it was proposed that in-depth interviews would be conducted with project staff, their customers, and staff at projects’ partner organisations, including the Pension Service Local Service (PSLS). The rationale for the inclusion of these sub-groups is discussed in Appendix E.

The following research encounters with each case study were proposed (the maximum total for each respondent group across all the case studies is given in brackets):

- in-depth interviews with five project staff (45);
- in-depth interviews with two staff from partner organisations (30);
- in-depth interviews with five customers (65);
- observations of two service delivery encounters at each selected project (26).
1.4.2 Sample selection and recruitment

A different approach to selecting and recruiting respondents from each of the stakeholder groups was needed. The reasons for this and the approach taken for each group is outlined below.

**Project staff**

To select staff to participate in in-depth interviews, short telephone interviews were conducted with project managers from all 13 projects at the outset of the qualitative case studies. These interviews provided greater contextual detail about the projects and enabled the research team to identify staff members involved in the projects and collect contact details for them. Because of the varied nature of Partnership Fund projects, a degree of flexibility was necessary to ensure that the most appropriate members of staff were selected for interview. At least two members of staff were interviewed at every project. However, in some cases, more staff were interviewed, depending on the size of the project and the division of responsibilities between staff members.

Once selected, each member of staff was contacted by telephone or email, given further detail about the evaluation and the opportunity to ask questions. They were then invited to participate and a suitable time for the interview was arranged. Each participating member of staff received a letter to confirm their interview appointment. This was accompanied by a research leaflet that provided more detail about the evaluation and their role in it (see Appendix B for a copy of the leaflet sent).

In total 38 interviews were conducted with staff. These were predominantly conducted face-to-face though one was conducted by telephone. This included four interviews with staff from the two projects that later withdrew from the study. Of these 38 interviews, five were paired interviews, bringing the total number of staff interviewed to 43.

**Partners**

The evaluation involved in-depth interviews with the Pension Service Partnership Liaison Manager (PLM) in each of the areas within which the case-study projects were set and with staff at organisations working in partnership with projects.

**Pension Service Partnership Liaison Managers**

A list of PLMs for the case-study areas was provided by DWP and each PLM was contacted directly. Researchers explained the purpose of the research and, once consent to participate had been gained, an interview was arranged. As a follow-up to the initial recruitment telephone call, PLMs were sent an email confirmation providing more detail about the research, and listing contact details for members of the research team if they had any questions prior to interview. In total, 14 interviews were conducted with PLMs. This included one for each case-study area and an additional PLM for a case-study project that later withdrew from the evaluation.
Staff at partner organisations

Managers of case-study projects were asked to identify organisations they worked in partnership with during the initial telephone interview. Partner organisations were also identified during interviews with project staff and during discussions between projects and the research team. Once contact details for partner organisation staff had been passed to the research team, a researcher contacted them directly to invite them to participate in the research. Once consent had been gained, an interview was arranged and a confirmation letter was sent. A copy of the letter can be found in Appendix B.

Where possible the intention was to speak to staff at one or two partners for each case-study. Identifying appropriate partner organisations was sometimes difficult. In one case, no partnerships had been developed. In another, the project’s service was delivered by a network of organisations. Interviews with staff from these organisations were treated as interviews with project staff rather than partners. Issues relating to the varied nature of partnership working are discussed in more detail in Chapter 7. In total, 16 interviews were conducted with staff at partner organisations. The majority were conducted face-to-face (nine) but some were conducted by telephone (seven) to accommodate busy work schedules.

Customers

The approach to identifying and recruiting customers was carefully considered in order to comply with data protection legislation and to ensure ethical practice. Two issues were key: accessing customers in a way that complied with the Data Protection Act (DPA); and, ensuring older people were fully informed about the research and their part in it, and could therefore give informed consent. These issues were reflected in the approach employed and are discussed further in Appendix E.

This element of the evaluation aimed to speak to five customers of each initiative. On the basis that not all those who were invited to participate would do so, projects were initially asked to identify 20 customers to whom further information about the study would be given. They were asked to select customers with a range of different demographic characteristics.

The projects sent these customers a ‘recruitment pack’ that included a letter introducing the research, a consent form asking for their permission for the funded project to pass on their contact details to NatCen and some other demographic information and a postage-paid envelope for the return of consent forms to the project. Copies of the letter, leaflet, consent form, and recruitment instructions for staff can be found in Appendix B.

If customers consented to share their contact details, these were passed to the research team and at least five customers were purposively sampled according to key criteria decided at the outset of the research. These criteria were gender, age, ethnicity, marital status, and type of help received from project. The number
of contacts with project and the length of time since their last contact were also monitored. Selected customers were sent an initial letter and leaflet with further information about the study, tailored specifically to the case-study in question. Copies of the leaflet and letter sent to customers can be seen in Appendix B. This was followed up by a phone call from the research team, asking if they would like to take part. If appropriate, a time and date were then arranged for the interview. Finally, participating customers were sent a letter confirming their appointment and another copy of the information leaflet (see Appendix B).

Customers who did not consent to their contact details being shared with the research team received no further contact from the project about the research study.

A free-phone number was offered to customers who received information about the evaluation so that they were able to speak to a member of the research team and raise any questions they had about the research. Customers were encouraged to use this facility both prior to making a decision about whether or not to take part in the research and following an interview or observation encounter.

For two of the case-studies, leaflets and customer recruitment documents were translated into community languages. To ensure that details about the study were accessible to customers from Black and Minority Ethnic (BME) communities where English was not their first language.

In recognition of the time it would take for projects to administer this recruitment process, they were each given an honorarium of £200 to contribute to the costs involved and minimise its impact on their resources.
### Table 1.1  Profile of the customer sample

<table>
<thead>
<tr>
<th>Sample variable</th>
<th>Number in sample</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>30</td>
</tr>
<tr>
<td>Female</td>
<td>30</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
</tr>
<tr>
<td>60-69</td>
<td>18</td>
</tr>
<tr>
<td>70-79</td>
<td>27</td>
</tr>
<tr>
<td>80+</td>
<td>15</td>
</tr>
<tr>
<td><strong>Ethnicity</strong></td>
<td></td>
</tr>
<tr>
<td>White British</td>
<td>52</td>
</tr>
<tr>
<td>BME</td>
<td>8</td>
</tr>
<tr>
<td><strong>Marital status</strong></td>
<td></td>
</tr>
<tr>
<td>Married</td>
<td>34</td>
</tr>
<tr>
<td>Single/widowed/divorced</td>
<td>26</td>
</tr>
<tr>
<td><strong>Benefits</strong>*</td>
<td></td>
</tr>
<tr>
<td>Pension Credit</td>
<td>18</td>
</tr>
<tr>
<td>Attendance Allowance</td>
<td>34</td>
</tr>
<tr>
<td>Disability Living Allowance</td>
<td>8</td>
</tr>
<tr>
<td>Council Tax Benefit</td>
<td>20</td>
</tr>
<tr>
<td>Housing Benefit</td>
<td>12</td>
</tr>
<tr>
<td>Carers Allowance</td>
<td>7</td>
</tr>
<tr>
<td><strong>Number of contacts with project</strong></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>2</td>
<td>9</td>
</tr>
<tr>
<td>3+</td>
<td>47</td>
</tr>
<tr>
<td><strong>Last contact with project</strong></td>
<td></td>
</tr>
<tr>
<td>Within last three months</td>
<td>29</td>
</tr>
<tr>
<td>Between three and six months</td>
<td>14</td>
</tr>
<tr>
<td>More than six months ago</td>
<td>15</td>
</tr>
<tr>
<td>Unknown</td>
<td>2</td>
</tr>
</tbody>
</table>

*Refers to those benefits about which the customer received advice or assistance from the Partnership Fund project. Some customers received advice or assistance about more than one type of benefit.

In total, 60 customer interviews were conducted. Of these, 23 were paired interviews with customers who lived together and had experienced the project’s services together. These customers included married and cohabiting couples, and siblings. This brings the total number of customers interviewed to 83. For the purposes of sample monitoring, data was collected for the primary respondent in each case. A breakdown of the achieved customer sample is shown in Table 1.1. The implications of the approach to sampling customers in this way and the achieved customer sample are discussed in more detail in Appendix E.
Observations

The process for selecting and arranging observation encounters involved several stages. First, project staff were approached about appropriate service delivery encounters and suitable contexts were discussed with researchers. Once a situation had been selected, and staff had agreed to their work being observed, staff were given a set of guidelines that set out the procedures for arranging the observations. Project staff contacted relevant customers to tell them about the observations and ask them if they wished to take part. A leaflet providing information about the observations was also given to customers and project staff were asked to obtain customer consent prior to a researcher observing any project activity. This leaflet included the free-phone number to allow customers to contact the research team with further questions prior to the observation. Copies of the observation guidelines and the observation leaflet can be found in Appendix B. If customers consented, a researcher was present at their appointment with the project staff member. The customer’s permission for the researcher to observe was requested again at the outset of the observation. In total 19 separate observations of project activity were conducted although some sessions included observations of multiple staff-customer encounters.

An overview of the achieved sample for each of the components of the qualitative case studies is given in Table 1.2.

Table 1.2  Achieved sample for qualitative case studies

<table>
<thead>
<tr>
<th>Component</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interviews with project staff</td>
<td>38*</td>
</tr>
<tr>
<td>Interviews with partner staff</td>
<td>16</td>
</tr>
<tr>
<td>Interviews with PLMs</td>
<td>14</td>
</tr>
<tr>
<td>Interviews with customers</td>
<td>60**</td>
</tr>
<tr>
<td>Observations</td>
<td>19</td>
</tr>
</tbody>
</table>

*Includes five paired interviews. Total number of staff interviewed is 43.
**Includes 23 paired interviews. Total number of customers interviewed is 83.

1.4.3 Conduct

The qualitative case studies employed in-depth interviews and observations. The conduct of these with each respondent group is outlined here.

In-depth interviews

In-depth interviews were conducted with staff, partners and customers of Partnership Fund projects because of their exploratory and explanatory power. A topic guide was designed for each respondent group – staff, partners and customers – to ensure that the issues discussed were relevant to each group and that, within each group, a similar set of issues were explored with every respondent. Copies of the topic guides can be found in Appendix C. Interviews were conducted between November 2005 and November 2006. Two case-studies were selected for a pilot stage of fieldwork (this took place between November 2005 and January 2006).
and these initial interviews were conducted by researchers working in pairs, allowing the research team to reflect on recruitment and fieldwork approaches and make amendments to topic guides before continuing with fieldwork.

- **Interviews with staff and partners**

Interviews with staff and partners took place in their work offices and lasted from one to one-and-a-half hours. On a few occasions, to accommodate interviewees’ busy work schedules, interviews were conducted by telephone. Nine staff or partner interviews were conducted this way. All the interviews were digitally recorded with the permission of respondents and transcribed verbatim. Every effort was made to ensure that as far as possible interviews with staff and partners were confidential and anonymous. However, because of the unique nature of some of the projects, it was made clear to respondents that there was a possibility that people who were familiar with the projects might be able to identify them from the published report.

- **Interviews with customers**

Interviews with customers lasted from one to one-and-a-half hours. The majority of the interviews were conducted in customers’ homes, however some had expressed a preference to be interviewed at the project’s premises, and this was accommodated. Customers were guaranteed confidentiality and anonymity at all stages of the research. £20 was given to each respondent as a token of appreciation for their participation and to cover any expenses incurred by taking part. Two of the interviews were conducted in a language other than English. This was facilitated by an independent translator who simultaneously translated the questions of the interview and the respondent’s answers.

Researchers were sensitive to the fact that in some cases, customers were frail or in poor health. Researchers regularly checked with the respondent about their need to take a break and this was reflected in the structure of the topic guide. Researchers also took a flexible approach to the length of the interviews, and shortened interviews where it felt appropriate to do so because of the respondent’s health or tiredness.

**Conduct of non-participant observations**

The purpose of the non-participant observations was to observe project activity in order to contextualise and triangulate the evidence collected in other components of the study. Observing Partnership Fund projects in action helped to pin-point and understand good practice, and provided further insight into the experiences of project staff and their customers. The original intention was to conduct two observations at each project. In practice, the nature of project activity sometimes made it difficult to identify suitable activities to observe. In one case, an observation was conducted with a project delivering their service in another language. On reflection, it was felt that observing this had been of limited value because of the researcher’s inability to follow the content of the meeting. As a result, the decision...
was made not to conduct further observations at this project and at another case-study, whose customer focus was a specific ethnic minority group, for this reason.

A range of service delivery encounters were observed: advice sessions in customer homes; road-show events; and, drop-in advice sessions in project offices. To collect data during the observations a pro-forma was drawn up, and this was filled in by the researcher during and immediately after the observation. A copy of the pro-forma can be found in Appendix B. After each observation, a brief informal interview was conducted with the project worker to explore their perception of the interaction. This gave the researcher the opportunity to ask questions about issues that had arisen in the observation. In the original research design, the intention was to conduct short five minute post-observation interviews with each customer. In practice however this proved difficult because customers were tired after meetings often lasting over an hour-and-a-half and it felt inappropriate to prolong the interaction. In cases where the observation took place in the customer’s home, the presence of the project worker also made conducting a private interview with the customer difficult. As a result, few post-observation interviews were conducted with customers.

1.4.4 Analysis

Interviews were digitally recorded and later transcribed verbatim. Transcripts were analysed using ‘Framework’, a method developed by the Qualitative Research Unit at NatCen. More detail about this approach to analysis is given in Appendix E. To accommodate the different experiences of staff, partners and customers, a separate analytical framework was developed for each respondent group. The data gathered in the observations pro-forma was also analysed using Framework.

1.5 Telephone survey

The quantitative component of the evaluation comprised a telephone survey of all projects funded by the Partnership Fund. The aim was to understand the types of service offered by funded projects and help to identify common issues among schemes.

1.5.1 Sample design

All 173 Partnership Fund projects were included in the quantitative research sample, including the 13 projects that participated in the qualitative case studies.

1.5.2 Sample recruitment

The approach to recruiting the sample for this study required consideration of the need to collect information about Partnership Fund projects as a whole, rather than about the individual staff members who participated in the survey. In common with business surveys, it was necessary to identify one respondent at each scheme who would be able to provide information on many aspects of the project’s work. It was not, however, expected that one person would be able to
answer questions relating to all aspects of the history of the project, its day-to-day working arrangements and services offered. Early findings from the qualitative case studies also suggested that project staff might have very different levels of knowledge about different aspects of their project. For example, only those with responsibility for managing the funding of the project might be aware of the application process for the Partnership Fund or the project's eventual funding levels.

It was clear therefore that the quantitative research questions might require input from more than one respondent which would be impractical for a survey administered by telephone. Therefore, a paper self-completion questionnaire (referred to as ‘the information sheet’) was designed to provide the member of staff with prior knowledge of the key survey questions and allow them to gather information and responses from other project staff where necessary. Although this information sheet was clearly valuable to respondents during the course of the telephone interview and they made reference to it at relevant points throughout, the completed documents were not collected and did not form part of the evidence base for this evaluation.

Project contact details were provided to the research team by the Department and a letter outlining the nature and purpose of the evaluation was sent to all projects in May 2006. A copy of this introductory letter is contained in Appendix A.

The survey fieldwork was divided into two stages. There were two reasons for this. The first was that projects whose funding lasted 12 months were due to close at around the same time as the quantitative fieldwork was due to start. It was therefore important to prioritise these projects to ensure staff were available to participate in the survey. These projects were included in the first stage of the survey fieldwork. Secondly, this stage served as a pilot of the quantitative research and provided an opportunity to test the survey instrument.

At least seven days prior to commencement of fieldwork for each stage of the survey, all projects included in that stage were sent a reminder letter that detailed the dates of fieldwork for that stage and a copy of the information sheet. Letters were sent to the main contact at each project, who was then asked to identify who within that Partnership Fund project would be best placed to complete the information sheet and to take part in the telephone interview. The letter provided a further overview of the evaluation and informed respondents that a member of NatCen's Telephone Unit would soon contact them to arrange a convenient time for interview. Respondents were also given the telephone number of the Telephone Unit if they wished to suggest a convenient date and time for interview in the meantime. The letter also gave the contact details for a member of the research team so that staff were able to ask any outstanding questions about the evaluation. Two versions of this letter were used, one for those who participated in the qualitative case studies and the other for all other projects. Copies of these letters and the information sheet can be found in Appendix A.
The survey achieved a response rate of 97 per cent, meaning that 167 of the 173 projects were interviewed, see Table 1.3. Further detail about the survey response rate and a breakdown of the types of project staff who responded is given in Appendix D.

### Table 1.3 Telephone survey achieved sample

<table>
<thead>
<tr>
<th>Outcome</th>
<th>Number of projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interviews achieved</td>
<td>167</td>
</tr>
<tr>
<td>Unproductive cases¹</td>
<td>6</td>
</tr>
<tr>
<td>Total (sample size)</td>
<td>173</td>
</tr>
</tbody>
</table>

¹ Unproductive cases include: where contact was made and interviewer was asked to call back; where contact was not made with the respondent and the interviewer was asked to call back; broken appointments; disconnected or unobtainable telephone numbers; and, refusals.

### 1.5.3 Conduct

The survey was conducted using computer assisted telephone interviewing (CATI) because it was the most efficient way of engaging such contacting the Partnership Fund projects which were so geographically dispersed. This is described in more detail in Appendix D.

The timing of the two stages of telephone survey fieldwork were as follows:

- **Stage 1**
  
  The 32 projects whose funding ended on or before 30 June 2006 were interviewed in Stage 1 between 7 June 2006 and 4 July 2006.

- **Stage 2**
  
  The second stage of fieldwork aimed to conduct interviews with 149 projects (this figure includes the eight projects who did not take part in Stage 1). Stage 2 fieldwork commenced on 3 August 2006 and ended on 19 September 2006.

The content of the questionnaire was agreed in consultation with DWP. The wide range of information required was broken down into the following topic areas within the questionnaire:

- **a.** The Information Sheet, the respondent and the project.
- **b.** Core Target Customers.
- **c.** Identifying and contacting customers.
- **d.** Engaging the Customer.
- **e.** Providing a service to the customer (including benefit advice and other quality of life services and advice).
f. Working in partnership.
g. Project set-up, location, staff.
h. Monitoring and evaluation.
i. Use of funding now and in the future.

Preliminary findings from the case studies were used to inform the content of the questionnaire, including both broad topics for inclusion and information about potential code frames. This information was also used to inform the use of definitions within the survey. Changes were made to the survey instrument following Stage 1 fieldwork. These served to reduce complexity and repetition, and ultimately the length of the interview. Further details about these changes is provided in Appendix D. A copy of the final survey instrument is available via the DWP website (www.dwp.gov.uk).

1.5.4 Data processing and analysis

Stage 1 and Stage 2 data were edited and combined in order that they were analysed as a complete dataset. The recoding of the data took different forms depending on the nature of the data collected and the differences between Stage 1 and Stage 2 questions, but the approach was to recode Stage 1 data to ‘fit’ the Stage 2 data structure. This was achieved by creating new derived variables which were then merged into the final dataset. All new and existing variables were given labels to describe their content and the values were similarly labelled. Descriptive analyses of the combined Stage 1 and Stage 2 data were produced using SPSS. Again, further information about how the survey data was processed and analysed is provided in Appendix D.

1.6 Coverage of this report

The remainder of this report is divided into three broad sections. The first includes three chapters that deal with the context and the foundations of the Partnership Fund. The second deals with project activity and comprises three distinct chapters on targeting, engagement and partnership working. The third and final section draws together findings on the impact of the Fund on older people and the organisations that worked with them. It also draws together the conclusions of the evaluation about the value of the Partnership Fund and sets out the key issues underpinning the good practice of the organisations involved.

The report uses verbatim quotations throughout and case examples. In order to preserve respondents’ anonymity, quotations from project staff, customers and partners are referenced only by respondent type (e.g. staff) and by project name (A, B, C, etc.). Quotations from PLMs are not linked to the projects that were situated within their locality in case this allows them to be identified. Pseudonyms have been used in all case examples.
Numerical tables throughout show data from the survey not the qualitative case studies. The base for each table is indicated. Many survey questions were multiple response and therefore frequencies and percentiles may add up to more than 167 and 100, respectively.
Section A
Context and foundation
2 The context of older people’s lives

This chapter provides a profile of Partnership Fund project customers. It illustrates the diverse range of circumstances and needs of project customers and so provides important context for the findings presented in the rest of the report. The first section will explore the life circumstances of the older people interviewed and what this means for what they require of Partnership Fund projects. The second section will summarise the barriers to benefit take-up identified by the older people and place this in the context of what we already know about barriers to benefit take up for older people. The third, and final, section will describe the sometimes complex interaction between needs and barriers.

2.1 The circumstances and needs of Partnership Fund customers

The interviews with customers of Partnership Fund projects provided a wealth of data about their everyday lives. Customers described a diverse range of needs relating to health, housing, caring responsibilities, social networks and finances. The range and complexity of these needs affected Partnership Fund projects, impacting on the services they offered, the ways they targeted customers, and the delivery methods they used. This related to:

• **Health issues**

Health problems and their impact on daily life was a consistent theme throughout the interviews with customers of Partnership Fund projects. Customers who described themselves as being in poor health spoke about the impact this had on their ability to pursue leisure activities and maintain social networks. For those that had impaired mobility as a result of their illness this was particularly profound. They spoke of rarely leaving their homes, being reliant on others for their basic needs, and limited opportunities to pursue leisure activities. Mental health issues and their impact on family relationships, social activities and leisure pursuits were also raised by customers. Inevitably, these issues affected customers’ quality of life and their ability to access services. Help with domestic tasks, personal care and the
installation of equipment and adaptations to homes were all health related needs identified by customers.

- **Caring responsibilities**

While 33 per cent of Partnership Fund projects targeted their services specifically at carers, the evidence from the customer interviews suggests that carers were supported by many of the other projects as well. The intensity of these caring responsibilities varied from low level support for a partner during a period of illness to intensive long-term care for a relative with a degenerative illness or permanent disability. Those caring for relatives with high levels of need spoke about the pressure and strain it placed them under and the negative impact this had on their own health and well being. Other impacts included restricted social networks and feelings of isolation. Emotional support and respite care were key needs of this group. As with customers with poor health, carers also found it difficult to access services because their caring responsibilities meant leaving home for any length of time was difficult.

- **Housing difficulties**

A range of needs related to housing were expressed by Partnership Fund project customers. In particular, financial concerns related to rent arrears and council-tax were raised, as were concerns about the maintenance and upkeep of homes on a limited income. The need for support with the upkeep of gardens and homes and for the adaptation of homes to accommodate impaired mobility were common concerns.

Though current housing was a focus of customer narratives, previous housing circumstances was also discussed. Customers who had experienced periods of homelessness, or had lived in temporary or unfit accommodation in the past, spoke of how this now contributed to a range of current needs. These included health problems and difficulties in maintaining social networks.

- **Social networks**

Customers of Partnership Fund Projects had varying levels of support and contact from family, friends and social networks. Some led active social lives and participated in a range of leisure pursuits, while others were isolated and had limited social contact. Poor health and caring responsibilities were highlighted by customers as factors that increased isolation and prevented them from socialising. Bereavement also had a negative impact on social networks, as did financial factors including the costs of transport and leisure activities. For some Black and Minority Ethnic (BME) customers, language barriers were also a factor.

- **Financial**

A broad range of financial needs were raised by customers. These included issues such as the difficulty of making ends meet on a low income, the apparent high cost of meeting basic living standards, their relative lack of disposable income in comparison with others and their fear of, or their experiences of, accumulating
debt. For those who described themselves as struggling financially there were a range of impacts. These included greater dependence on family members for financial help, increased stress and anxiety as a result of money worries, and limited social networks because of the prohibitive costs of transport and leisure activities. The financial cost of health conditions, such as the cost of essential medical equipment or the expense of trips to the GP or hospital, was highlighted by those in poor health. In this context, the need for financial advice, including information and support on benefit entitlement, was paramount.

2.2 Customer barriers to benefits take-up

Research into benefit take-up amongst older people has identified a wide range of complex and interlinking barriers (Costigan et al, 1999), (NAO, 2002), (DWP, 2005). Looking specifically at the barriers and triggers to claiming Pension Credit, research has found that perceived ineligibility, lack of awareness and fear of the effects of interaction with other benefits were the primary barriers to take-up. A range of secondary barriers have also been identified. These include a reluctance to disclose financial information, fear of submitting documents, a complicated application process and fear of making mistakes in the application process (Bunt et al, 2006, 2). Perceived stigma surrounding claiming benefits, and the wish to remain independent and self-sufficient have also been found to deter people from claiming (Costigan et al, 1999, 23). In addition to these barriers, specific groups of pensioners are faced with further problems. Research with BME groups has found that language barriers and issues relating to residency status can compound and exacerbate the barriers already discussed (Barnard & Pettigrew, 2003). The problems faced by rural pensioners particularly around transport and accessing advice and services, are also barriers to take-up (NAO, 2002, 5).

Briefly outlined here are the barriers to take-up identified by customers and project staff, many of which echo the barriers identified in other research. These barriers fall into two broad categories and are summarised in Figure 2.1.

2.2.1 The benefits system, processes and administration

Customers described a range of barriers that related to the benefits system, its processes and administration. In particular, a lack of awareness of what benefits were available, and perceived ineligibility were issues raised repeatedly in interviews. Evidence from the survey also confirmed perceived ineligibility as a major barrier to take-up with 30 per cent of project staff stating that it was the most common barrier to take-up of Pension Credit and 31.7 per cent highlighting it as the most common barrier to take-up of Attendance Allowance. Echoing other research on benefits take-up (Costigan, 1999), there was also an assumption amongst some customers interviewed that they would be pro-actively approached if they were eligible for support.

In addition to confusion over eligibility, there was a general feeling amongst customers and project staff that the benefits system was too complicated.
particular, application forms were seen to be too complex and to deter customers from applying. Customers found it difficult to fill them out, and it was felt that some of the application forms presumed an expert level of benefits knowledge. Of particular concern to project staff was the tendency amongst some customers to understate their needs when completing application forms for disability related benefits. Both the complexity of the forms, and a reluctance to admit the level of their needs were contributing factors to this problem. The fear of accidentally claiming fraudulently and the possible consequences was also a barrier to take-up. Customers spoke about not wanting to ‘get in trouble’ and concerns were raised about being over-paid and then asked to pay it back.

Previous experiences of the benefits system also had an impact. Customers who had applied for benefits in the past and been turned down, were deterred from applying again. Negative past experiences of dealing with benefits applications were also said to underpin customer reluctance to apply. Here, older people talked about what they saw as unhelpful staff or said that they felt uncomfortable in official offices. There was also a reluctance to disclose personal financial information, and the need for privacy was a key issue raised by customers and staff.

As other research has found, the stigma of applying for benefits continues to be a barrier to take-up (Costigan, 1999) (DWP, 2003). Customers talked about feeling embarrassed and guilty and references were made to ‘begging’ and ‘sponging’. Associated with these attitudes, a desire to remain independent and a reluctance to ask for help were also barriers to take-up.
Figure 2.1 Barriers to take-up of benefits

The benefits system, processes and administration

Eligibility:
- Low awareness of benefits available.
- Perceived ineligibility.
- Fear of claiming fraudulently and the consequences.
- Wrongly advised in the past that they were ineligible.
- Assumption that they would be automatically informed if eligible.

Perceived nature of benefits system/application process:
- Put off claiming by complexity of application forms.
- Turned down on previous occasion.
- Fear of the benefits system and suspicion of official agencies.
- Negative past experiences.
- Reluctance to disclose personal financial information.
- Lack of privacy.

Stigma of benefit receipt:
- Stigma attached to claiming benefits.
- Feelings of embarrassment.
- Perception that benefit receipt equates to a loss of independence.

Individual barriers

Literacy:
- Adversely affecting completion of application forms.
- Rendering advice and information inaccessible.
- Lowering awareness of benefits available.

Health:
- Limiting access to advice and information.
- Adversely affecting completion of application forms.

Caring responsibilities:
- Limiting access to advice and information.

Communication:
- Language barriers adversely affecting completion of application forms and accessing advice and information.
- Perceived lack of facilities for people with hearing impairments.

Transport:
- Lack of transport preventing access to advice/services.


2.2.2 Individual barriers

Alongside the barriers that relate to the benefits system and its administration, another set of barriers described by customers and project staff related to the circumstances of individuals. Among these, low levels of literacy were highlighted as a barrier by staff and customers, both in terms of making it difficult to access advice and information about benefits, and in terms of making the process of applying for benefits more difficult.

Health conditions and caring responsibilities were also barriers to take-up of benefits. Poor health and caring responsibilities both limited the extent to which customers could leave their homes, consequently restricting their access to support and advice. Sensory and physical impairment were also said to make it difficult to complete application forms.

Benefit take-up was also hindered by communication problems. Language barriers were highlighted by BME customers both in terms of accessing help and advice and in filling out applications, a finding echoed by other research (Barnard et al, 2003). Project staff also spoke about the difficulty customers with hearing impairments face in accessing help. Dealing with staff that may not be deaf aware was highlighted as a particular barrier for this group, increasing their reluctance to seek help.

The issue of transport in rural or semi-rural areas, was also a concern. A lack of public transport was highlighted as a barrier to older people accessing sources of support and advice in relation to benefits and other services. It was also acknowledged that health problems, caring responsibilities and cost of transport were all factors that prevented older people from accessing the transport that was available.

2.3 The interaction of needs and barriers

Previous research has described barriers to take-up of benefits as ‘multi-layered and multi-dimensional’, arguing that for any one individual there are often several barriers affecting take-up (Costigan et al, 1999, 21). Findings from our interviews and observations with customers and staff of Partnership Fund projects support this statement. Barriers to the take-up of benefits were complex, and it was not uncommon for one customer to refer to multiple barriers and multiple needs. It is also important to note, that different groups of older people experienced different barriers to a greater or lesser degree. For example, BME older people interviewed described literacy and language barriers as key issues, while staff providing services in rural areas emphasised transport as a primary concern for their customers.

This complex range of interlocking needs and barriers is evident in the following case studies of Partnership Fund customers:
June is 73 and lives with her partner. Health problems have limited their ability to get out and about, and they are struggling financially. They assumed they were ineligible for Attendance Allowance because they thought it was for people who were completely incapacitated, and when they applied for Council Tax Benefit in the past they were unsuccessful. Because their health problems limit mobility they have found it difficult to access advice and support, and they are uncomfortable discussing their personal finances in public. Describing herself as a ‘worrier’ June is concerned that increases in personal pensions might affect any benefits they receive. In addition to the help they need with their finances, they also need adaptations to their home to help them get in and out of the bath.

John is 71 and is the long-term carer for his wife, after she suffered a stroke several years ago. The responsibility of caring for his wife has put a strain on his own health and he needs practical help with caring for his wife, as well as emotional support to cope with the strain. Alongside these needs, John also has trouble reading and writing and before her stroke his wife had always dealt with the finances. After she became ill they had no financial help and they were living off their savings. Because of his literacy problems he struggled to find out what benefits he was eligible for: ‘I’m no good at reading and writing, so you can understand it’s like… having… sticky tape stuck across your mouth and you can’t talk to anybody. You didn’t know what to ask for’. Filling out application forms and reading correspondence is also a struggle for John, who needs practical help and advice to access the benefits he and his wife are entitled to.

These case studies illustrate that the needs of project customers and their barriers to take-up of benefit were complex and varied. To meet these needs and successfully increase take-up of benefits and improve access to services, Partnership Fund projects had to address these issues and tailor their support to the individual customer.

The lives of customers are undoubtedly complex and pose particular challenges for Partnership Fund projects and for the ultimate success of the Fund. In a similar fashion, certain key characteristics of the funded projects were instrumental in their capacity to put the Fund’s vision into action. It is these ‘foundations’ that we turn to in our next chapter.
3 The evaluation framework for the Partnership Fund

This chapter provides an overview of the evaluation framework for the Partnership Fund programme. In particular, we describe a model illustrating how the range of circumstances of the funded projects operated and the variety of methods and strategies used to deliver services impacted on the take-up of benefits and social care services amongst hard to reach older people. This provides the structure for the rest of the report and chapters four through nine explore the different aspects of the model in detail.

A key objective of the Partnership Fund was to increase the take-up of benefits and other services amongst older people. To meet this aim, projects were funded with the intention that they would use innovative methods that would bring the services they offer closer to older people considered to be hard to reach by the Pension Service. This resulted in 173 different funded projects each with a diverse range of circumstances and ways of working. This diversity is the cornerstone of a programme which aims to generate innovation, however it has presented significant challenges to the design and conduct of the evaluation. In order to capture such diversity, the evaluation needed to be flexible and responsive to individual projects circumstances.

This brief chapter, then, describes what the Partnership Fund was anticipated or expected to achieve and articulates how this innovative programme was evaluated using a ‘theory of change’ model.

3.1 Theory of change models

Every programme designed and implemented to encourage any form of social change can be said have a theory of change related to it. Theories of change identify and describe the building blocks, pathways and methods necessary

---

2 'Social care services’ refers to a broad range of services that might meet the needs of older people. These include, but are not limited to, advice and assistance relating to mobility aids, personal care such as meal on wheels or personal attendance, property maintenance and modification, heating and fuel payments, legal advice and befriending.
The evaluation framework for the Partnership Fund

for a programme to achieve its desired goals. In providing this explanation of how movement or change occurs, these theories consider the inter-relationship between three different types of features of a programme:

- **Foundations** refer to the structures or circumstances that help to enable the desired outcome to take place. In some cases they may be things that are fixed such as the size of the organisation or where the organisation is located. Conversely, these preconditions may also be things that are flexible and can be changed such as organisational or group policy, appointment of co-ordinators or working parties, allocation of funds/resources, or staffing levels.

- **Processes** refer to what needs to happen in order to achieve the desired outcomes and concern how different systems and procedures work with each other. For example, how two internal departments combine their resources and share staff expertise to achieve the shared goals of an organisation, or how different organisations work in various ways and use a range of methods in order to provide services to their customers.

- **Outcomes** unsurprisingly refers to the short, intermediate and longer-term outcomes of the activity or programme of processes activities.

### 3.1.1 Partnership Fund theory of change

In the course of analysing the various strands of evaluation data, it was clear that this broad framework had considerable resonance for the interpretation of the emergent findings. In this respect, the aim and key anticipated outcome of the Partnership Fund is to ensure that older people have access to the benefits and range of services to which they are entitled. However, underlying this objective was the reality that there are older people who are particularly ‘hard to reach’ or vulnerable. This is supported by a number of studies that have identified a range of barriers such as suspicion, pride, social isolation and language or literacy issues that prevent older people from engaging with benefits services from statutory providers. These are explored in greater detail in the previous chapter. Consequently, established local and national organisations, who were skilled at and had a track record of providing benefits or other services within the local community, were felt to have necessary foundations (i.e. their expertise and vision) in place in order to best identify and provide services to older people.

Previous literature also suggests two key features of successful benefits and support service provision for older people. The first concerns the use of personalised, proactive methods that puts the customer’s needs at the heart of the interaction with the service. The second feature relates to effective joint working within agencies and between organisations. In the context of the Fund, the use of innovative and personalised delivery methods such as roadshows and home-visits, alongside effective integrated partnership working were expected to be the **processes** by which contact with older people was made and sustained. This, it was hoped, would enable benefit assessment to take place and also bring this vulnerable older people group nearer to a range of relevant statutory and voluntary services.
Figure 3.1 shows this detailed theory of change for the Partnership Fund which acts as a summary of the foundations, processes and outcomes depicted in the evaluation data collected. The key benefit for exploring the projects in this way is that it can pinpoint how the foundations, processes and outcomes work together in different ways for different projects.

**Figure 3.1  Partnership Fund theory of change**

<table>
<thead>
<tr>
<th>Foundations</th>
<th>Processes</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Funding</strong></td>
<td><strong>TARGETING CUSTOMERS</strong></td>
<td>Customers</td>
</tr>
<tr>
<td>• existing sources</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• ability to attract funding</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Nature of Partnership Fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Vision</strong></td>
<td><strong>SERVICE DELIVERY METHODS</strong></td>
<td>Staff</td>
</tr>
<tr>
<td>• Strategy planning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Partnership Fund objectives</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Expertise</strong></td>
<td><strong>PARTNERSHIP WORKING</strong></td>
<td>Organisation</td>
</tr>
<tr>
<td>• work with older people</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• project set-up</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• understanding the challenge</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Environment</strong></td>
<td></td>
<td>Local services network</td>
</tr>
<tr>
<td>• location</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• uniqueness</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• venues</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The foundations and processes outlined above were identified as they pinpoint the conditions that have the greatest potential to describe and explain the range and diversity of experiences and outcomes across both the qualitative case study projects and survey data. This is not to say that other aspects of staff, partner or customer experiences do not have a salient role in explaining the extent to which projects met their aims and will not receive coverage throughout the report. However, they are not included in the model as they do not have the same descriptive and explanatory potential as the foundations of the projects and processes driving service delivery described previously.
This chapter has described the Partnership Fund theory of change which will be used as a framework for the evaluation and is reflected in the structure of the remainder of the report. In the next chapter, we examine the foundations of the Partnership Fund in detail.
4 The foundations of the Partnership Fund

In the previous chapter we have described how the Partnership Fund can be explored and evaluated by looking at three key aspects of the programme: the underlying foundations of projects; the processes used to engage customers and deliver services; and the outcomes achieved. This chapter examines the first of these – the foundations of the Partnership Fund. It explores the four key building blocks that make a difference to what projects are able to offer older people and how customers are subsequently engaged. These encompass the resources available to projects to work with older people, an organisation’s plans for how it will it achieve its desired outcomes, an organisation’s experience and skill at providing benefits and social care assistance, and the location of a initiative. These are summarised in Figure 4.1.

Figure 4.1 The foundations of project delivery

<table>
<thead>
<tr>
<th>Funding</th>
<th>Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Nature and level of existing sources</td>
<td>• Nature and extent of strategy planning</td>
</tr>
<tr>
<td>• Ability to attracting additional funding</td>
<td>• Precision of project objectives</td>
</tr>
<tr>
<td>• Resources received from Partnership Fund</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expertise</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Working with older people</td>
<td>• Location</td>
</tr>
<tr>
<td>• Setting up the Partnership Fund project</td>
<td>• Uniqueness in the community</td>
</tr>
<tr>
<td>• Understanding the challenge of the task</td>
<td>• Range of venues operated from</td>
</tr>
</tbody>
</table>

These four circumstances influencing project delivery are explored individually in this chapter. However, although they are described separately, it is not the case that these different aspects of the Partnership Fund work in isolation from each
other. Instead, they influence each other in different ways and it is the precise nature of this interdependence that has a bearing on what was achieved for each funded project.

4.1 Funding

Of the four building blocks supporting the delivery of project services described in Figure 4.1, funding is the pivotal one since it has the potential to influence each of the other three in a variety of ways. For example, the resources available to organisations have a bearing on the scope of project objectives and plans for service delivery. In turn, this can impact on what is ultimately offered and achieved. Funding levels also have an influence on the finances available to projects that enable them to develop a depth of experience in working effectively with older people. Finally, the range and suitability of venues in which meetings with older people actually take place are determined to a great extent by the funds available to projects.

This section explores three key aspects of the funding process that influence a project’s capacity to deliver services to older people: the range and extent of a project’s existing funding sources; an organisation’s capacity to generate additional funding; and, the amount of money received from the Partnership Fund to deliver services. Table 4.1 displays survey data pertinent to these three issues that is drawn on in the following sections.

### Table 4.1  Funding profile of the Partnership Fund projects

<table>
<thead>
<tr>
<th>Categories</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Duration of funding</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 months</td>
<td>29</td>
<td>17</td>
</tr>
<tr>
<td>15-18 months</td>
<td>19</td>
<td>11</td>
</tr>
<tr>
<td>24 months</td>
<td>119</td>
<td>71</td>
</tr>
<tr>
<td><strong>Cost of project</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low (&lt;£50,000)</td>
<td>48</td>
<td>29</td>
</tr>
<tr>
<td>Medium (£50-£99,000)</td>
<td>87</td>
<td>52</td>
</tr>
<tr>
<td>High (&gt;=£100,000)</td>
<td>32</td>
<td>19</td>
</tr>
<tr>
<td><strong>Start up delay (multiple response)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staffing difficulties</td>
<td>48</td>
<td>29</td>
</tr>
<tr>
<td>Took longer than expected to develop partnerships</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Promotional literature not ready</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Timing of funding decision</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Delays in other funding</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Other reason</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>No delays in getting up and running</td>
<td>107</td>
<td>64</td>
</tr>
</tbody>
</table>

*Base: 167*
Figure 4.2 illustrates the links between the three key aspects of funding and other circumstances of the projects. The sections below explore these features and their relationships in detail.

### 4.1.1 Existing funding sources

Partnership Fund projects derived their funding from a variety of places. The precise portfolio of funding sources had definite implications for how stable a project was or felt itself to be. In turn, this has a key bearing on the organisation’s capacity to deliver services to older people.

Projects in the qualitative research described receiving funding from a diverse array of sources. These included central government, local authorities, statutory health organisations, a range of charitable trusts such as the Big Lottery Fund, and donations from local private companies and individual members of the community. The precise combination of sources differed considerably across the funded projects. For example, Project 19 described receiving their annual funding from twenty two different sources that included some money from their local authority and National Health Service (NHS) Trust, a substantial amount of money from a community regeneration fund and various smaller amounts from companies such as Lloyds TSB. In contrast, other projects were funded from one place such as Project 123 who received 100 per cent of their annual budget from their local Social Services department.
Though the nature and diversity of funding sources provides a useful context to the work of projects, they are not the most important feature of existing funding sources. Rather, the time scale attached to the finance received is a more salient issue because this had significant bearing on how confident the projects felt and how well equipped they were to develop longer-term objectives for the delivery of project services. Taken together, these signify different patterns or profiles of funding amongst Partnership Fund projects. These concern whether a project receives:

- continuous funding from one primary source only that enables the project to deliver its services;
- a contribution to the project’s resources from one primary source with these funds supplemented by smaller amounts of money from a range of other sources;
- all funds from multiple funding sources that are either one-off amounts or have to be re-applied for.

These three patterns of funding are closely related to the sector within which projects are situated. Local authorities and, to some extent, voluntary national organisations reported receiving all or most of their funding from one core source. Conversely, voluntary local projects were characterised more by receipt of funding from multiple sources that were time or task limited.

The different patterns of funding outlined have varied implications for how stable projects appear to be, or how staff and partners describe them to be. This, in turn, affected the degree to which staff could, or felt they could, develop longer term goals, improve project premises or foster sustainable local partnerships. The difficulty and strain of ‘living from hand to mouth’ was underscored by some projects that were funded from multiple unstable sources. For example, staff from Project A, a voluntary local advice service, described how badly affected the organisation was when their local council grant was severely cut. In this case the project lost half of its premises which meant cramped working conditions that subsequently placed a lot of strain on staff relationships. A further consequence of the cramped venue the project was operating from was a perceived loss of customer confidentiality as the project was forced to schedule two customer appointments in one room at the same time. Similarly, Project B, a voluntary national general advice service, described receiving funding from sources that was largely time limited that they felt could not be relied upon.

Projects with stable and secure sources of funding presented a very different picture of how the resources they received allowed them to develop their objectives and increase service provision. For example, Project K, a statutory advice service received all their funding from the local authority in order to help them implement
the ‘fairer charging’ initiative. In this case, staff from the project described how their service had expanded over three years with a 300 per cent increase in the number of employees. This enabled the project to deliver a joined-up local service as they were able to place staff in a range of venues across the region working alongside local authority specialist teams providing a range of social care services to older people.

While the stability of funding is important, it is clearly not the only determinant of a project’s capacity to deliver services effectively. It is obvious that a project’s ability to utilise resources cost effectively will also have a considerable impact. It should be noted that this evaluation did not explore how projects, or their parent organisations, employed the funds they received, from the Partnership Fund or from other sources.

4.1.2 Attracting additional funding

These different funding profiles meant that projects were not operating with similar resource levels. This, in turn, had implications for the capacity of the projects to generate further funding, as illustrated by staff recollections of the application process for the Partnership Fund. Two aspects are particularly important:

- how projects found out about the Partnership Fund;
- the process of actually writing and submitting the tender.

Discovering the opportunity for funding

The level and stability of projects’ funding sources had a bearing on the nature of existing partnership working and the extent of a project’s strategy for how it planned to deliver its services. These two aspects of the projects influenced how they initially heard about the possibility of funding from Department for Work and Pensions (DWP), and why their interest in the Partnership Fund was stimulated.

Some staff spoke about discovering the opportunity for funding from a range of existing local or national partnerships. For example, staff from Project M, a statutory initiative with ‘fairer charging’ as its core aim, talked about how being on a local ‘partnerships against poverty’ group made them aware not only of the possibility of receiving Partnership Fund money, but also of a clear gap in service provision for particular older people. Alongside face-to-face meetings, newsletters, email and internet sites were other ways that local networks told their members about the Partnership Fund. Staff from Projects J and I, both voluntary local initiatives with stable funding sources, described receiving an email from their local networks. Here the call for funding was seen as timely as both these projects were looking

---

3 Fairer Charging is a means test to determine a service user’s ability to contribute to support charges. It aims to ensure that people are not worse off as a result of supporting people and that those who cannot afford to pay for their support charge receive financial help.
at ways to increase the range of benefits assistance services they were providing for their customers.

Conversely, projects with low levels of unstable funding described doing less local networking, had fewer strategic goals and therefore were not as likely to hear about potential funding opportunities. For example, some staff described browsing the Internet or newspapers for any potential funding sources and coming across the call for Partnership Fund applications by chance. In these cases, some project workers described their approach to generating funds as one where they would ‘apply for all funding and then see what happens’.

Making the application

Evidence from the qualitative research also shows that the stability of funding has a bearing on the ability to attract additional project finance. Staff from organisations with less stable or multiple funding sources had more experience of making funding submissions and discussed how they found the application and guidance relatively straightforward to navigate. For example, Project J’s parent organisation, the local branch of a national advice service, employed a member of staff whose role was to procure funding and who had significant experience of doing so. This member of staff commented that without such in-depth understanding of making applications for funding, staff at other projects might have been at a disadvantage.

In contrast, projects that described limited previous experience of submitting tenders for funding found the process hard and a drain on sometimes limited resources. The process at these projects was characterised by the involvement of numerous staff on an application that sometimes took a long time to develop. This limited experience undoubtedly lowered expectations about whether the application would be successful. There was some suggestion that this may also have had a bearing on how convincing the actual application was and how confident it appeared in asking for funds and in justifying their need. This was particularly pertinent to the accounts of some staff from voluntary local organisations where they talked about surprise that ‘a scruffy project like them got anything at all’ or that they felt ‘DWP were taking a risk with them’.

4.1.3 Duration and amount of funding received from the Partnership Fund

The final aspect of a project’s funding profile that it is important to consider is the length of time projects were funded for and the amount of money they received from the Partnership Fund. The Partnership Fund provided resources to projects over three periods of time. Seventeen per cent of projects were funded for 12 months, 11 per cent for 15-18 months and 71 per cent of projects for two years. The amount of funding allocated to projects ranged from £14,050 to £212,000. For evaluation purposes, DWP research staff categorised the amount of funding into three discreet bands, low (those projects that received less than £50,000), medium (between £50,000 and £99,999) or high cost (funding of £100,000 or
greater). Of the 173 funded projects, 29 per cent were low cost, 52 per cent were medium cost and 19 per cent were high cost.

The duration of funding had important implications for funded projects. Indeed, the shorter the duration, the more challenging it appeared to be. For projects that were funded for 12 months a recurrent theme was how difficult it was employing and keeping skilled staff for this period of time. This had a clear impact on service delivery as the delay in attracting and then keeping suitable staff meant that some projects were only operating with a full complement of project workers for nine months. Project D, a voluntary local initiative, for example, spoke about taking on and training a member of staff only for them to leave after three months. The manager of the project was clear about how much easier it would have been to attract another person into the role if the job had lasted for more than nine months. Likewise, the manager of Project C, a statutory service which lasted 12-18 months, discussed how staff retention was a constant problem that impacted on team building and morale across the four partner projects delivering services.

Evidence from the survey also supports the relationship between 12-month funding and staffing problems. Of the eight projects funded for 12 months who reported a start-up delay, all but one said that this was related to difficulties recruiting staff. Conversely, staff retention was not such a relevant issue amongst those projects in the qualitative research funded for 18 – 24 months. The issue of project or role stability is again pertinent. Two-year projects had sufficient time to advertise the posts in newspapers, an approach which generated applications from a range of different candidates. Alternatively, the stability of the project enabled skilled staff from other departments to be seconded into the Partnership Fund role.

The second implication of 12-month funding was the limited time it gave projects to test and refine their aims and methods. Given the innovative nature of the work, it was necessary to try different approaches for which time was needed, time the shorter funded projects did not always have. For example, staff from Project A, a voluntary local project, talked about being six months into the role before realising the impact partners would have on targeting customers. However, as there were only a few months left for the project to run, it was felt that there was not enough time to develop partner relationships that would have an impact on the take up of benefits. In contrast, projects funded for two years were, on the whole, satisfied with the money and time allocated to them to develop and implement their approach effectively.

Although the duration and amount of funding is a key factor underpinning project capacity, the way in which funds received were utilised will undoubtedly also have had significance. A detailed exploration of how funds were allocated within projects was beyond the scope of this evaluation, as was any assessment of the effectiveness with which funds were employed. Nevertheless, it is clear from the case studies that those with a stable funding base were more equipped to use the funds generated by the Partnership Fund to innovate and develop services, whereas there was evidence to suggest that those projects with more unstable financial circumstances used the funds, in part, to sustain their very existence.
4.2 Vision

The vision of a Partnership Fund organisation refers to its outlook or its plans for how it will go about and achieve the take up of benefits for older people. It is a crucial foundation of project delivery because it provides a map of how the projects hoped to increase benefits take-up. This section describes project vision in two ways: the nature and extent of strategy planning within organisations and the objectives projects set to achieve their outcomes.

4.2.1 Strategic planning

It is clear that organisations had varied capacity to think and act strategically. The resources available to projects had a key bearing on the extent of forward planning amongst the initiatives. Some projects described having a range of plans and aims for the take up of benefits whereas others provided little evidence of planning within their organisation. The extent of strategy planning had a clear impact on the provision of benefits and social care services, in two ways:

- **Developing a project profile**

  Organisations and existing projects that were well-resourced were able to clearly map how the Partnership Fund would contribute to the organisation’s overall vision for the take up of welfare benefits in the local community. The Partnership Fund, for some, was seen as another opportunity to help their organisation further develop its reputation as an expert in benefits provision locally. By increasing the standing and credibility of the project, the Fund was seen as a catalyst to the take up of services by helping to spread the message amongst older people in the community that the project could be trusted to provide benefits and social care support. This is in sharp contrast to the experience of projects who received funding from short-term, unstable sources. In these organisations, there was less emphasis on how the Partnership Fund could be used to develop the organisation’s profile and more on its role in generating much needed funds.

- **Appointment of staff to strategic roles**

  This varied emphasis on strategy was reflected in the ability of organisations to explicitly fund staff with some sort of remit for strategy planning. Stable, well-funded projects sometimes employed people who were responsible for the strategic development of the organisation, thereby ensuring that the project reached the widest possible customer base during the Partnership Fund programme. For example, one of the managers of Project M, a local authority who received their funding from one stable source, was responsible for ensuring that the range of services provided, and policies developed, continued to meet the needs of the local community. In turn, this ensured that the organisation’s Partnership Fund work was well focused and had the greatest possible impact on hard to reach older people.
In contrast, where funding was unstable, strategic development would still take place but with fewer resources devoted to this work. This meant that staff had less time to plan how the organisation could maximise the take up of benefits and social care services as they were also required to do many other tasks. For example, the manager of Project E, a carers support service, spoke of how they had to provide lots of ‘on the job’ support to new front-line staff in the first six months when they are learning the role. Consequently, it was recognised that this work detracted from other important tasks such as developing new benefits take-up policies in order to help the organisation grow.

4.2.2 Objectives

Projects varied considerably in how they described their objectives. For some projects, the description was fairly limited with little discussion of how the objectives would be achieved. As such they commonly concerned broad issues such as ‘wanting to increase the take-up of benefits’ or make contact with ‘hard to reach older people’. In contrast, amongst other projects, there was a clear rationale for Partnership Fund service with multiple objectives discussed that can be broadly classified as either organisational or methodological.

Organisational objectives encapsulate aims such as being able to link the project in with external services in order to reach customers outside of an existing project’s catchment areas. Methodological objectives concentrated on issues such as finding more innovative ways to target and engage customers than some projects were using before the Partnership Fund programme.

For projects to offer the most effective way of delivering services to older people, a blend of both organisational and methodological objectives clearly provided the most solid foundation on which to increase the take up of benefits and social care services. That is, without the organisational aims it is questionable as to how effective innovative methodological objectives will be in influencing outcomes. The experience of Project A, a voluntary local project illustrates this dilemma. Here a very innovative and proactive way of targeting and engaging customers was implemented. However, there was a complete absence of partnership working or strategy to link the organisation in with other local services. Consequently, six months into the life of the project, the project worker talked about running out of places to advertise the service and being disappointed by the take-up of benefits achieved.

4.3 Expertise

The level of experience, acquired know-how and skill within the organisation had a clear affect on project capacity to deliver services. This manifested in three ways:

- how experienced projects were in delivering benefits and social care services to older people;
the experience of an organisation in setting up the project;
the range and extent of support provided to staff delivering project services.

Table 4.2 displays survey data pertaining to these three issues that is drawn on in the following sections.

**Table 4.2  Expertise of the Partnership Fund projects**

<table>
<thead>
<tr>
<th>Categories</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Level of project experience</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project experienced in working specifically with older people</td>
<td>53</td>
<td>32</td>
</tr>
<tr>
<td>Project did not have specific experience of working with older people</td>
<td>114</td>
<td>68</td>
</tr>
<tr>
<td><strong>Recency of project set-up</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>54</td>
<td>32</td>
</tr>
<tr>
<td>Existing</td>
<td>113</td>
<td>67</td>
</tr>
</tbody>
</table>

*Base: 167*

### 4.3.1 Experience of working with older people

This section maps the impact of the experience gained working with older people on the provision of services, highlighting where it differed from those projects with less experience and the implications of this. This is explored in two ways: organisational experience and staff experiences.

**Organisational experience**

There were some obvious differences in the extent to which different funded projects were prepared for delivering services to older people. Underpinning this was whether organisations were drawing on established expertise in working with older people developed before the Partnership Fund. Just under a third of projects in the survey (32 per cent) were experienced in working specifically with older people. We know from the qualitative research that such organisations had a range of existing procedures, policies, partners, and established methods to draw upon when working to increase the take up of benefits and social care services. This is in contrast to projects who were working with older people specifically for the first time. This meant that they had to learn about their client group and effective strategies for engaging them while they were delivering the project.

When customer targeting was discussed, staff from projects continuing to deliver a service for older people spoke about how existing customer databases and lists, developed by either the project or a partner, were utilised to target potential clients for the Partnership Fund. In addition, existing referral or signposting relationships between projects and their partners were also a valuable source of customers. However, amongst some projects that were providing a specific service
to older people for the first time lists of potential customers were not so readily available, unless specific partnerships had been developed to provide them. Here these projects tended to use more opportunistic methods of reaching potential customers such as repeatedly sending out mailshots to all addresses in an area. However, this is not to say that the mailshot is not an effective method of targeting customers, as will be shown in Chapter 5.

The experience a project had of targeting older people for the Partnership Fund also had an impact on how the project was able to use the funding it was allocated. There is evidence to suggest that amongst those projects with no pre-existing sources of potential customers, resources were split between ways of finding customers and the process of delivering the service. Conversely, where a potential customer pool was already in place, a greater proportion of project resources were directed towards service delivery work.

A further example of how an organisation's expertise in delivering services to older people had an effect on Partnership Fund service delivery is the level of knowledge that exists within the organisation about established ways of effectively engaging older people. This might be about working with all older people or, alternatively, specific sub groups of the population, such as older people with disabilities or from minority-ethnic groups. Those with experience recognised that they had a good idea of 'what works' and how to approach it in their local community or with their target group. Those without experience sometimes experienced problems engaging older people. The experience of Project A, a voluntary local initiative that was providing a new service for all older people by delivering benefits assessments, provides a clear example of this. Here, due to customer suspicion about the aim of the service, the project worker described how difficult he found it engaging some older people from minority ethnic groups. Consequently, he felt that having a Black and Minority Ethnic (BME) worker would have increased the project’s effectiveness in service delivery which had not been part of the original plan. This would have been an obvious step for other projects experienced at working with a diversity of older people.

Staff experiences

It was not just an organisation’s expertise that was important, the experience of staff recruited to the projects also had an impact on how services were delivered. This manifested in two ways and encompassed the range of skills staff had developed working with the general population and project workers’ awareness of and motivation to address the specific needs of older people.

Project staff talked about coming to the Partnership Fund project from a range of generic customer service backgrounds where the interpersonal skills they had developed throughout their careers were seen as key to the effective delivery of benefits and social care services. As such, project workers described a wide range of people skills, developed throughout their working lives, that were considered to be useful in engaging hard to reach customers. These included listening, giving people time and space to make a decision and the use of humour to sometimes
defuse sensitive points in a customer encounter. The use of interpersonal skills in service delivery is explored in greater depth in Chapter 6.

Alongside these general skills, staff awareness of and motivation to address the needs of older people was also a key asset. This was expressed as having a sense of duty or commitment to older people and appeared to stem from two aspects of a worker’s own life. First, a project worker’s own spiritual or moral beliefs motivated some to try to help others. This gave working with excluded older people in challenging circumstances a sense of meaning and direction:

‘I’m very committed to welfare rights. So it’s a passion of mine...I think I’m quite socially minded, I’m a Christian and... the poor will always be with you it says in the Bible but those poor... still need help.’

(Project K, staff)

Second, personal or family experiences prompted compassion and empathy with a particular type of older person or indeed with older people generally. It also generated unique insights into the lived experience of certain types of older people. This is exemplified by the accounts of project workers from minority ethnic groups. They described how living amongst a particular community in the United Kingdom (UK) helped them to understand the day to day problems experienced by older people in that community in accessing benefits and social care services. Consequently, these project workers spoke of how they incorporated this sort of knowledge into the design of their Partnership Fund services, for example by being flexible around the length of appointments:

‘They came to the country, they migrated here and they very much look to themselves and their own community to help one another. And they’re very tight on that. And I think I’m right in [knowing that] they are particularly difficult to target and they’re very proud. And they’re very keen to tell you their story. So there’s not a timescale on it really, you can say, ‘Well have an appointment for an hour.’

(Project C, staff)

### Table 4.3  Delays to project set-up

<table>
<thead>
<tr>
<th>Categories</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delay in start-up</td>
<td>60</td>
<td>36</td>
</tr>
<tr>
<td>New projects delayed</td>
<td>43</td>
<td>72</td>
</tr>
<tr>
<td>Existing projects delayed</td>
<td>17</td>
<td>28</td>
</tr>
</tbody>
</table>

*Base: Projects that experienced delayed set-up (60)*
4.3.2 Project set-up

The nature and extent of any delay projects experienced rolling out the initiative further demonstrates the influence of expertise on the delivery of benefits and social care services. Thirty-six per cent of projects in the survey described experiencing delay in getting the project up and running. Projects in the qualitative research generally described start-up delays of one to two months. Whether the project previously existed or was developed specifically for the Partnership Fund programme was a factor underpinning delay. Seventy-two per cent of projects that experienced delays getting the project up and running were delivering services for the first time.

There were two factors contributing to start-up delay amongst the projects:

- **the method used to deliver services**
  
  Start-up delays were particularly pertinent to projects using service delivery methods for the first time and demonstrate how methodological innovation, forward planning and expertise is an effective combination to increase the take up of benefits. For example, Project A, a voluntary local initiative was using an innovative method of service delivery for the first time. This involved providing benefits advice to older people from a market stall in range of inner city street markets. However, project staff were unaware of and subsequently underestimated the length of time it took obtain a market trader licence. In turn this caused the project some delay in getting into the community.

- **developing materials to target customers**
  
  The development, publishing and distribution of marketing materials was the cause of delay amongst ten per cent of projects. Given that some projects were only funded for 12 months, this was important because customers in some areas had less time to find out about, and subsequently access, some project services. From projects in the qualitative research, the key factor underpinning this delay was that staff had seriously underestimated the resources involved in producing targeting materials and this was particularly pertinent when this type of publicity had not been previously used by the organisation.

4.3.3 Understanding the challenge of the task

The final aspect of project expertise that had an impact on the delivery of services was whether organisations recognised the challenging nature of the work project staff were doing throughout the Partnership Fund programme. This manifested in the nature and extent of the support projects had in place to offer their staff to help them carry out their role, which in turn has a bearing on motivation and ultimately staff retention. Amongst the qualitative projects, staff were overwhelmingly clear about how valuable the support they received was to their role. From their perspective it gave them the implicit message that they were not alone doing this demanding work.
Different degrees of support were in place with some staff describing extremely limited backing from their organisation or none whatsoever. Where support was evident this took two forms: practical support in the form of seeing how others deliver similar services, skills-sharing and training; and, personal and emotional support. Practical support sometimes took the form of having other internal or external projects in the area that staff could seek advice from. Here this meant being able to discuss issues such as the best way to continue working with a customer or how to complete particular benefits forms to enable the older person to continue to engage with project services. Emotional support allowed staff to ‘off-load’ their experiences by discussing them with others. For one member of staff working within a local authority organisation, sharing an office with social work colleagues meant that she was able to ‘debrief’ after difficult home visits and therefore did not take the issues home with her.

It is clear that not all organisations had the resources to provide extensive support to their staff. For example, within the qualitative case studies, all local authority projects talked about various support or supervision structures in place, or in one case a project steering group. Amongst the voluntary local and national projects there was greater diversity of support provision. However, those projects that offered severely limited or no support to staff were voluntary local projects delivering services from one venue.

4.4 Environment

This section maps the final foundation of the Partnership Fund by exploring the effect project environment has on service delivery and outcome. There are three key ways in which project surroundings had an effect on the delivery of Partnership Fund services:

- the area within which a project is based;
- how unique the project was within that neighbourhood;
- the range and type of venues the project used to deliver its services.

Table 4.4 displays survey data about these three issues that is drawn on in the following sections.

4.4.1 Project location

Partnership Fund projects were based in diverse geographical areas. Just over a quarter (27 per cent) of projects interviewed in the survey considered themselves to be from an urban area, just under half (48 per cent) from a mixed urban and rural setting and the remainder (25 per cent) from a rural location. A recurrent theme within the qualitative research was that there were a number of challenges faced by both customers and staff from projects based in rural, urban and mixed locations. These all had the potential to impact on the achieved outcomes of the project and are described ahead.
Where projects were situated in locations that were not well served by public transport or the customer was housebound, it was clear that home visits played a key role in the delivery of benefits and social care services. The distance project staff had to travel to get to an appointment had a clear bearing on service delivery, and this was particularly pertinent to projects located in rural and mixed settings in two ways. First, project workers had to have access to a car as it was sometimes impossible to reach customers’ homes using public transport. Second, it could take a long time to travel to and from a customer’s home. For example, some staff talked about how they would sometimes drive for up to an hour for one appointment and this subsequently limited the number of older people they could see in one day.

### Table 4.4 Location and venues of the Partnership Fund projects

<table>
<thead>
<tr>
<th>Categories</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Location (Base: 167)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Urban</td>
<td>45</td>
<td>27</td>
</tr>
<tr>
<td>Mixed urban/rural</td>
<td>80</td>
<td>48</td>
</tr>
<tr>
<td>Rural</td>
<td>42</td>
<td>25</td>
</tr>
<tr>
<td><strong>Venues (Base: 142; missing data: 25 cases)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project operates from one office</td>
<td>79</td>
<td>47</td>
</tr>
<tr>
<td>Project operates from more than one office</td>
<td>43</td>
<td>26</td>
</tr>
</tbody>
</table>

Survey data in Table 4.5 provides further support for the impact of distance travelled on service delivery as it shows project staff from rural areas travelling far greater distances to their customers than those situated in urban settings. For example, 68 per cent of staff from projects in urban areas were travelling up to four miles to make appointments with a further 23 per cent travelling an average of five to nine miles. In contrast, 80 per cent of staff from rural projects were making typical journeys of at least ten miles to appointments and in some cases these journeys covered distances of up to 50 miles. Unsurprisingly, this impacted on how long each journey took. Here data from Table 4.6 shows 60 per cent of staff from urban projects reported the typical trip to a appointment taking up to ten minutes whereas 59 per cent of staff working in rural locations were taking 90 minutes or more to make a typical trip.

Table 4.4 displays survey data regarding the location of projects and the number of venues they operated from. Tables 4.5 and 4.6 show the impact of project location on the typical distance travelled to appointments and the average journey time respectively.
Where the project was situated in a rural location, some staff described how this often increased the sense of isolation amongst customers as some found it almost impossible to get from their home to the project offices on often limited public transport services. Consequently staff from Project B, a voluntary local organisation in a rural area, described how being able to get to and deliver the service in the customers home was absolutely vital if the project was to be successful in increasing the take-up of benefits amongst older people. In contrast, car access was not an issue impacting on staff from projects in urban settings as these areas were, on the whole, well served by public transport. Consequently, staff resources permitting, these projects were able to confidently offer both home visits and office appointments to older people as the project worker could reach the customer’s home and customer could get to the office with relative ease. Clearly, the nature of urban locations meant that the time taken to travel to appointments did not have such a bearing on service delivery as customers’ homes were often in the immediate vicinity of the project offices.

For those projects in urban or mixed settings where the organisation was better served by public transport, some project staff recognised the need to provide a border range of service locations. This sometimes manifested in the provision of ‘drop-in’ advice sessions at the parent organisation as well as a home visit service. Consequently, staff resources in urban and mixed locations could sometimes be stretched with project workers trying to cover both the project offices as well as being able to reach older people in their homes.
This section has shown how the location of the project could impact on the extent of Partnership Fund service provision, and how this was particularly noticeable for organisations based in rural settings. However, there were also advantages to being situated in a rural area as this could have a bearing on how unique the service was locally. This feature of environment and its impact on service delivery is explored below.

### 4.4.2 Uniqueness

How unique a project was had important implications for its profile and ultimate appeal to older people within the local area. This manifested in two ways.

First, some projects were unique as a direct result of where they were based. This had a key bearing on project outcomes as staff did not have to worry that they may be losing potential customers to other local organisations providing benefits and social care services. Projects in rural locations seemed to have a particular advantage here with staff having less of a tendency to talk about other competing services in the immediate vicinity. For example, Project B, an organisation providing a service to all older people in a rural setting, described customers coming to use the service from a number of villages in the surrounding area as the nearest other advice service was ten miles away.

Those projects that were providing services to a specific group of older people, such as those with disabilities or carers, illustrate the second kind of uniqueness. These projects differ from the first group above as they can be unique irrespective of their rural or urban location, or whether there are other benefits advice projects in the immediate area. However, the same advantage applies: that projects have something of a monopoly in local provision. For example, Project H, a service for people with mental health difficulties, spoke of being unique in their area because, despite there being generic services around, they are the only project locally to help people with enduring mental illness.

In sharp contrast to the two sets of circumstances described above, some projects were not unique at all. Consequently, some staff in this situation described the rivalry that develops when competing with sometimes numerous other organisations for what was described as ‘a limited potential customer pool’. This had the potential to impact on service delivery and partnership, discussed in Chapters 6 and 7 respectively.

### 4.4.3 Venues

The final illustration of how the environment can affect delivery is illustrated by the range and type of different venues projects used to deliver their services. The place or places where project services were delivered may on the surface seem like a trivial issue, however, the number and condition of venues affected service delivery in two key ways. First those projects delivering services from multiple venues clearly have a greater capacity to reach older people as a customer in a particular area could be targeted and engaged in a range of potential settings.
Second, the condition or suitability of the setting has the potential to influence the quality of the encounter between project worker and customer.

A wide range of venues was evident across all of the projects funded. Table 4.4 shows that just under half (47 per cent) were delivering their service from one office, while 26 per cent operating from two or more venues.

When projects in the qualitative research described delivering Partnership Fund services from one small venue within their parent organisation, this sometimes impacted on service delivery. For example, working from one place was sometimes compounded by the fact that the venue, typically a standard office, was shared with colleagues who were not connected to the project. Consequently, when Partnership Fund services were delivered, there could sometimes be interruptions to customer meetings as other staff entered the room to access files, phones or use computers. Conversely, other projects that were operating and delivering services from multiple venues often had offices set-aside in each for the conduct of Partnership Fund work. This enabled customer encounters to take place in an environment where any disruptions were kept to an absolute minimum.

With this in mind, it is clear that some organisations did not have the resources or capacity to do anything about the range or type of accommodation that they were delivering services from. However there is again some evidence to suggest that the sector within which the organisation is situated has a bearing on the range and type of accommodation used to deliver Partnership Fund services. Here, a distinguishing feature was that all the local authority projects that took part in the qualitative research were operating their services from multiple venues. This suggests that these projects have a greater capacity to deliver services than some projects from the voluntary sector. However, when this relationship is explored using survey data the picture is not quite so clear cut, with just under 50 per cent of projects across all sectors working from one small venue and little distinction by project type. The survey data does however suggest an association between whether or not projects had a parent organisation and operating from multiple venues. Seventy-four per cent of projects operating from more than one venue reported having a parent organisation4. The qualitative case studies demonstrated that whilst some projects operated solely from their parent organisation’s premises, others were set up at different premises but were able to utilise venues belonging to their parent organisation for different activities.

This chapter has described the four foundations of Partnership Fund activity and explored how they have bearing on how services are delivered to older people. This completes the discussion of context and brings the first section of the report to an end.

---

4 Sixty-six per cent of all projects reported having a parent organisation.
The next section explores project activity in detail and begins with a chapter exploring how projects targeted older people in order to provide benefits and social care services.
Section B
Project activity
5 Targeting potential customers

This chapter is the first of three that explores the activity of Partnership Fund projects. It describes how projects targeted potential customers to ensure that their services reached as many of their target group as possible. The latter two chapters focus on delivery of services and partnership working respectively.

The main focus of this chapter is the description of the methods of targeting used by the projects and what they hoped to achieve. The chapter then explores how different methods were combined in order to facilitate an intensive targeting approach and the value of this to reaching customers. The chapter concludes by briefly considering how projects’ targeting methods evolved throughout the life of the programme.

5.1 Methods used to target customers

Projects described six broad methods of targeting older people:

- using existing databases;
- distributing printed materials (such as leaflets or posters);
- engaging the local and specialist media;
- transmitting details of the service through word of mouth;
- undertaking community outreach;
- using the telephone.

The first four of these methods were used just to target customers. The last two were used by projects to target customers and deliver benefits and social care services simultaneously. On the whole, very similar targeting approaches were used by projects regardless of the target population. However, the degree to which each of these methods was used by an individual project differed according to the characteristics of the projects and the needs presented by their customers. These differences are explored within the case study illustrations throughout this chapter.
Tables 5.1 and 5.2 show the extent to which the different targeting methods were used. It demonstrates that the most popular method of targeting was via outreach events with 92 per cent of projects reportedly using this approach. This is closely followed by use of printed material and the telephone (88 and 80 per cent respectively). The media was used by around two thirds of organisations (61 per cent), and existing databases by 36.5 per cent. Word of mouth was least popular being reported by only 17 per cent of projects as a method of targeting customers. However, this may be a function of the way in that this question was asked in the survey, as this data is in stark contrast to the use and effectiveness of word of mouth reported by the case study projects.

There are also some interesting distinctions to be made by organisation type. Local authority projects use word of mouth and outreach more frequently than the voluntary local organisations. The impact of capacity and expertise on the extent of service provision amongst the local authority projects, discussed in detail in Chapter 4, has relevance here. Project location also has a bearing on the use of some targeting approaches. Here, existing databases are used more by the urban than rural projects, with this pattern reversed for use of printed material.

### Table 5.1  Targeting approach by type of project

<table>
<thead>
<tr>
<th>Categories</th>
<th>All project %</th>
<th>N</th>
<th>LA %</th>
<th>Vol.nat. %</th>
<th>N</th>
<th>Vol. Local %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing databases</td>
<td>36.5</td>
<td>61</td>
<td>8</td>
<td>23.5</td>
<td>16</td>
<td>43</td>
</tr>
<tr>
<td>Printed material</td>
<td>88</td>
<td>132</td>
<td>17</td>
<td>87</td>
<td>59</td>
<td>89</td>
</tr>
<tr>
<td>Media</td>
<td>61</td>
<td>102</td>
<td>12</td>
<td>60</td>
<td>41</td>
<td>60</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>17</td>
<td>29</td>
<td>4</td>
<td>11</td>
<td>7</td>
<td>17</td>
</tr>
<tr>
<td>Outreach</td>
<td>92</td>
<td>153</td>
<td>20</td>
<td>91</td>
<td>61</td>
<td>90.5</td>
</tr>
<tr>
<td>Telephone</td>
<td>80</td>
<td>133</td>
<td>16</td>
<td>78</td>
<td>52</td>
<td>81</td>
</tr>
</tbody>
</table>

Base: 167, multiple response

However, it is worth noting that regardless of the methods projects used to target customers, the evidence suggests that the Partnership Fund enabled organisations to utilise targeting methods and work with people in a way that would otherwise have been beyond the scope or capacity of their parent organisation. The survey found that 30 per cent of projects felt that Partnership Fund helped them to actively contact more customers and use a wider variety of targeting methods than they otherwise would have.
Table 5.2  Targeting approach by region

<table>
<thead>
<tr>
<th>Categories</th>
<th>N</th>
<th>Rural %</th>
<th>N</th>
<th>Mixed %</th>
<th>N</th>
<th>Urban %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing databases</td>
<td>9</td>
<td>22</td>
<td>32</td>
<td>40</td>
<td>20</td>
<td>44</td>
</tr>
<tr>
<td>Printed material</td>
<td>37</td>
<td>91</td>
<td>70</td>
<td>88</td>
<td>40</td>
<td>89</td>
</tr>
<tr>
<td>Media</td>
<td>25</td>
<td>60</td>
<td>46</td>
<td>57</td>
<td>29</td>
<td>64</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>4</td>
<td>11</td>
<td>17</td>
<td>21</td>
<td>7</td>
<td>16</td>
</tr>
<tr>
<td>Outreach</td>
<td>37</td>
<td>92.5</td>
<td>75</td>
<td>94</td>
<td>40</td>
<td>89</td>
</tr>
<tr>
<td>Telephone</td>
<td>32</td>
<td>80</td>
<td>66</td>
<td>81</td>
<td>36</td>
<td>80</td>
</tr>
</tbody>
</table>

Base: 167, multiple response

Table 5.3 provides an overview of the methods used within each of the six targeting approaches and highlights the key things that each approach enabled projects to do. The features of each of the six targeting approaches, and why they were used by projects to a greater or lesser extent, are then described in detail in the sections that follow.
### Table 5.3 Overview of targeting approaches

<table>
<thead>
<tr>
<th>Existing databases Core sources</th>
<th>Written/printed material Types</th>
<th>Media Types</th>
<th>Word of mouth Types</th>
<th>Outreach Types</th>
<th>Telephone Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>DWP</td>
<td>Letters</td>
<td>Local papers</td>
<td>Family</td>
<td>Advertising project services with partners</td>
<td>Standard telephone advice service</td>
</tr>
<tr>
<td>The Pension Services</td>
<td>Leaflets</td>
<td>Community newsletters</td>
<td>Friends</td>
<td>Use of mobile bus services (akin to mobile libraries)</td>
<td>Telephone advice with facilities for the hearing impaired</td>
</tr>
<tr>
<td>Social Services</td>
<td>Posters</td>
<td>Specialist publications</td>
<td>Partner organisations</td>
<td>Drop in events with one organisation involved</td>
<td></td>
</tr>
<tr>
<td>Local authority organisations</td>
<td>Stickers</td>
<td>Internet pages</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other partnerships</td>
<td></td>
<td>Radio</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parent organisation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What it enabled</th>
<th>What it enabled</th>
<th>What it enabled</th>
<th>What it enabled</th>
<th>What it enabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>To focus project targeting on specific communities</td>
<td>To reach a broad potential customer base with mailshots</td>
<td>To reach a broad and/or specific customer base</td>
<td>To further develop the credibility of the organisation locally</td>
<td>To target customers and deliver services concurrently</td>
</tr>
<tr>
<td>To personalise targeting approaches</td>
<td>To capture hard to reach older people who are not on existing lists</td>
<td>To increase the standing of the organisation amongst customers and partners</td>
<td>Facilitate customer trust</td>
<td>To take the project into the heart of the community</td>
</tr>
<tr>
<td></td>
<td>To personalise approach and language for specific populations</td>
<td></td>
<td></td>
<td>To increase the profile of the organisation by working alongside project partners</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>To deliver services to a large number of customers at low cost</td>
</tr>
</tbody>
</table>
5.1.1 Using existing databases

The first type of targeting activity focused on utilising existing databases of potential customers. Irrespective of the source of the lists, this information was then used as a way of contacting people either by letter, leaflet, telephone or a combination of all of these. The extent of their use, how projects accessed customer lists, and the specificity of detail the lists contained varied across the projects.

Use of existing lists or other data sources to first identify potential customers was evident across 36 per cent of projects in the survey. The remaining 64 per cent of organisations did not have access to such information. Where pre-existing sources of information were used, 35 per cent of projects got this information either from their parent organisation or the customer details were available as a result of the project already existing before the Partnership Fund. Existing relationships with partners such as the Pension Service (12 per cent), Social Services (16 per cent) and the Local Authority (13 per cent) was a further source of potential customer details; with ‘other existing partnerships’ being a source of customers for a further 24 per cent of organisations. Table 4.1 shows that there was no real difference in the use of existing lists between different types of organisations.

The range of databases used had different degrees of depth and detail. Some contained rich detail about a persons benefits history and take-up of social care services which meant that staff had greater certainty that the customer fell within the scope of project aims. Others were somewhat more rudimentary, containing little more than names and addresses. Consequently, these projects had to conduct considerable work to ascertain customer eligibility for project services. It also meant that projects had less scope to refine their selection of potential customers.

The key advantage for projects that had access to this type of pre-existing customer information was that it meant that they did not have to use time and money re-collecting historical information from customers. Furthermore, it gave organisations and partners a degree of assurance that the resources invested in making project information available to people on the databases was not wasted effort as they could be certain that the older person fell within the scope of the initiative. For example, staff from Project G talked about how DWP gave them a scan of the details of older people in the area that may be eligible for Council Tax Benefit (CTB) and Housing Benefit (HB). Staff recognised this as a really successful way of targeting older people as the phone was used to make direct first contact with customers which in turn also allowed aspects of project service delivery would also take place. Another advantage of the use of customer databases is that they allowed projects to personalise the information they initially sent to older people. This was one way of presenting the project as a specialised, individual service that was a vital part of the targeting process as it also helped project literature stand out from other more generic offers of support a customer received.

One disadvantage of customer lists is that, used alone, they may have missed hard to reach customers who were not on any pre-existing local authority or voluntary sector databases.
5.1.2 Distributing printed materials

Printed material was used to target older people by almost 90 per cent of projects. This approach included advertising in newsletters and newspapers, on prescriptions, posters, leaflets, and within letters to potential customers. These methods were perceived by some staff to be effective because they were a cost-effective way of making a large number of potential customers aware of the services that a project had to offer.

This section first describes the key features of this range of targeting methods and how project staff felt they contributed to engaging customers. It then explores how these methods were customised according to the circumstances of the projects and needs of their customers.

Key features of printed material

The variety of different written materials produced (particularly leaflets, letters and posters) contained common features or elements in terms of content or design. This included facts about the range of benefits and social care services on offer, some information on partner agencies the projects were working with and details of how the project could be contacted for further information. In ten per cent of projects in the survey, the telephone contact point on a letter was a free-phone number. Staff in some projects also discussed including freepost response slips which was a further way of enabling customers to get in touch with the projects. The use of free telephone numbers and response slips had a key bearing on the take up of services because it facilitated people on very limited incomes in making contact with the project.

The discussion of the barriers to the take up of services shows that some older people are reticent to approach statutory benefits agencies for assistance due to suspicion, confusing systems and previous negative experiences with these services. Therefore, in order to overcome this barrier, a further common feature of how projects advertised their services was to state clearly, where it was possible, that the Partnership Fund initiative worked independently from large statutory organisations. By advertising this way, staff hoped that customers would perceive the project as different, and the service more personalised than the help on offer from statutory agencies. Customer accounts provide some support for this approach. For example, one customer from Project H, a voluntary local organisation helping people with a mental health difficulties, described how they felt that this project had the specific knowledge that enabled them to understand and relate to the customers circumstances.

How the written information targeting customers was to be displayed was also an important feature. Here, different techniques or approaches to presenting information were utilised in order to make the project stand out from other services. For example, Project A, a general advice project, talked about using leaflets with bold, large letters and colours that contained lots of examples of the cash customers should be getting for each benefit applied. Staff felt that the
advantage of this approach was this information not only caught the eye, but the cash examples stimulated the interest and thus questions from customers who were, on the whole, perceived to be living on very modest incomes. A customer of this project supports this view. Here they talked about how the leaflets and other information ‘stood out’ and that this prompted them to contact the project staff to discuss their situation.

The specific needs of some customers had a bearing on how some projects presented their information. As discussed earlier in the report, older people can be put off taking up benefits due to the seemingly confusing information material and the complexity of the benefits system. Thus, presenting information in a style and language that customers could relate to and understand was a priority for some projects.

The promotional material used by projects reflected customer need in a number of ways. This was sometimes a crucial way of making the information accessible to a wide range of older people. Organisations targeting disabled people, saw the use of different presentational styles as key to the engagement of disabled older people. Forty-two per cent of projects interviewed in the survey were using large print, 16 per cent were using Braille and audio recordings in order to assist customers with visual impairment and 37 per cent of projects had a telephone system that met the needs of people with hearing impairment. Organisations who had older people from ethnic minority in their target group echoed this. Just under a third of organisations interviewed in the survey reported translating their targeting material to cater for customers for whom English was not a first language. However, translating material was not always considered to be the most appropriate way of reaching older people from minority ethnic groups. For example, staff in Project I, an organisation working with South Asian older people, recognised that it was a waste of money designing posters advertising the project as a significant number of their customers could not read irrespective of the language project detail was displayed in.

The language used in leaflets was also tailored by some organisations working with particular groups of older people. Underpinning this approach was the need to recognise and make clear to potential customers that the project understood what the older person was going through, how hard their life could be and how the project could help. For example, Project F, a voluntary local project supporting carers described wanting to emphasise to customers that emotional support was a key part of their service. Consequently, their leaflets described the project as ‘always being on the end of the line if needed’.

5.1.3 Engaging the local and specialist media

Advertising in local and specialist media was the third way projects used to target older people. Sixty per cent of all projects in the survey said that they had used this approach. It was seen as beneficial in four key ways. First, community publications, were delivered to every address in the locality, and, therefore, this method offered
projects a way of reaching a wide range of potential customers with very little impact on the project budget. Second, they were another way of stimulating the interest of potential customers. For example, staff from Project G talked about placing lots of good news stories in newsletters about how certain customers had been successful in increasing their income. The rationale behind this approach was that it would motivate a customer to make contact with the project by making them think: ‘that person has been successful, maybe I’ll be successful also’.

Third, advertising in community newspapers also seemed to add a degree of credibility to some Partnership Fund projects. Underlying this approach was the view that newspapers were a useful way of subtly re-kindling the interest of customers who may have been resistant to an initial project approach. Again, staff from Project G support this view when they spoke of how a customer who had refused a home visit actually got back in contact with the project to ask for help. The key thing that had motivated this person to get back in touch with the service was seeing an article about the project in a community publication.

Finally, projects also publicised their services using a range of specialist media outlets to reach members of specific communities. For example, Project I, a service targeting South Asian older people, utilised this approach as a way of reaching as many members of these communities as possible. The method was seen as particularly beneficial because the circulation of the paper was so wide that customers approached them from a long way outside might be considered to be their usual customer catchment area.

5.1.4 Word of mouth

Projects also relied on word of mouth as a targeting technique. Of the six broad targeting approaches described, word of mouth was unique in that it relied on people who were not always the focus of the project passing on their view of the service to potential customers. Project staff were almost unanimous in highlighting the value of promoting their service by word of mouth. Underlying this view was the belief that this approach gave a seal of approval and credibility to project services that could not be achieved in any other way.

Survey data shows that 17 per cent of projects reported seeing new customers as a result of them being recommended to the project by their family and friends.

For word of mouth to be successful it was important that the potential customer trusted the person who was recommending the service. Projects used two mechanisms to stimulate this.

The first was by using past customers to spread the word about the project to other older people. It was clear that a project’s expertise in providing benefits and social care services played a key role in influencing the impact of this approach. When a customer who had received a good service told family and friends about their experience, this helped validate the funded project and was an important factor in influencing other older people to also approach the organisation for
help. For example, one customer from Project F, a carers service, described how they were speaking to a friend about their benefits and that the friend advised them to approach the project for helping in raising their Attendance Allowance payments. For this customer, this was the first step towards making a successful claim.

The second way to stimulate word of mouth was to focus on specific people close to the potential customers, such as their younger relatives, who could potentially influence a decision about whether to ask a project for help. The idea behind this approach was that people would naturally want their older relatives to have the most comfortable life possible and so would actively encourage them to claim all the money to which they were entitled. For example, staff in Project J, a general advice service, described placing project literature in health clubs to prompt people to think about whether their parents were getting all the benefits assistance they were entitled to.

5.1.5 Community outreach

The nature of some targeting methods was such that they could also be used to deliver services simultaneously. The last two methods remaining were of this nature. This section deals with community outreach while how projects approached customers using the telephone is discussed in Section 5.1.6.

Projects in the qualitative research reported a diverse array of practice when talking about how and where their community outreach took place. A useful distinction can be made between outreach events where one organisation was involved, and those that involved several organisations. Staff reported a wide range of outreach activities where the Partnership Fund project was the only organisation involved. These events took the form of a ‘customer drop in’ and varied in their intensity and focus. Projects advertised their drop-in events to a greater or lesser extent. Some took place at a venue in the parent organisation. Here this form of drop-in involved the project worker being on hand at a specific time to answer any questions the potential customer may have about their access to benefits and social care services. For example, staff in Project A, described how they advertised to potential customers that they would be on hand to provide information and take any questions about benefits every Wednesday and Friday morning. Drop-in events were also timed to coincide with regular project events such as luncheon clubs, dances, and bingo where the project knew that a significant number of potential customers would be on their premises.

Community outreach also happened at a partner’s premises. The advantage of this approach was the increased trust it was said to generate because older people were being approached in an organisation that they already had a relationship with. For example staff from Project K, a local authority initiative, described how they gave talks about the project’s services at coffee mornings held at a variety of sheltered housing venues and how this influenced engagement positively.
Community outreach activities were also undertaken as a joint venture with other projects or could involve a consortium of multiple partners. These were most commonly described as ‘roadshows’, although the term was used loosely to refer to an event or location that would potentially attract older people. The wide diversity of locations used is summarised in Table 5.4.

### Table 5.4  Location and aim of the community outreach approach

<table>
<thead>
<tr>
<th>Location</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community centres, village hall</td>
<td>123</td>
<td>74</td>
</tr>
<tr>
<td>Daycare centres, lunch clubs</td>
<td>52</td>
<td>31</td>
</tr>
<tr>
<td>GP surgeries, health centres</td>
<td>43</td>
<td>26</td>
</tr>
<tr>
<td>Places of worship</td>
<td>42</td>
<td>25</td>
</tr>
<tr>
<td>Supermarket, shops, markets</td>
<td>42</td>
<td>25</td>
</tr>
<tr>
<td>Libraries</td>
<td>33</td>
<td>20</td>
</tr>
<tr>
<td>Sheltered accommodation, warden controlled housing</td>
<td>32</td>
<td>19</td>
</tr>
<tr>
<td>Fetes, fairs, festivals</td>
<td>28</td>
<td>17</td>
</tr>
<tr>
<td>Local council, LA offices</td>
<td>28</td>
<td>17</td>
</tr>
<tr>
<td>Day hospital, hospital ward, hospital reception</td>
<td>27</td>
<td>16</td>
</tr>
<tr>
<td>Existing information advice centres</td>
<td>27</td>
<td>16</td>
</tr>
<tr>
<td>Other locations</td>
<td>22</td>
<td>13</td>
</tr>
<tr>
<td>Leisure centres</td>
<td>18</td>
<td>11</td>
</tr>
<tr>
<td>Partnership Fund project offices</td>
<td>13</td>
<td>8</td>
</tr>
<tr>
<td>Hospices</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Post office</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Dental surgeries, opticians</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

**Overall purpose**

| Advertise project services                                     | 140| 84 |
| Make appointment to visit customer at home                     | 130| 78 |
| Provide information on service or signpost to other service    | 100| 60 |
| Undertake benefit ‘health check’                              | 95 | 57 |
| Make appointment for customer to visit office                  | 90 | 54 |
| Other purpose                                                  |  2 |  1 |

*Base: 167, multiple response*

This type of targeting method is attractive to projects because it can be used to both inform customers of their services and actually deliver services, sometimes in a single encounter. This is supported by the survey data which shows that although 92 per cent of projects used this approach to advertise project services, nearly three fifths (57 per cent) used it to actually undertake a benefit health check on the spot. This method was also an effective way of engaging the older person in the project, with just over three quarters of projects (78 per cent) using them to make an appointment to visit the customer at home and just over half using them to make an appointment at the their own office.
This efficacy is underscored by the fact that a majority of projects (83 per cent) said that community outreach had resulted in more customers contacting the project and taking up their services. The qualitative research has indicated four key features of community outreach that contributed to this level of success. These encompassed:

• **the non-threatening environment**

  There were two key advantages for projects working in these settings. The first was that the service could be promoted and delivered in an environment that was not threatening or intimidating for the older person. Second, the social and recreational outreach venues meant that older people could have a diversity of motivations for attending. As such, potential customers could feel confident that they were not getting sucked in to a benefits specific advice service or feel that other older people would see them as needy. For example, a customer from Project G, a general advice service, described how they first came into contact with the project during a pleasant ‘pampering day’ at her local community centre. Here the fact that the setting was familiar to the customer and that they were enjoying being pampered opened the door for the project to make an effective approach about the benefits service available.

• **their potential to offer immediate support**

  This method was effective due the fact that it enabled clients questions to be addressed on the spot and a solution found, either there and then or at some identifiable point in the future. Where they were repeated in a local area it was this aspect of the service that was communicated through word of mouth and acted as a key stimulus for older people. Consequently, some project staff were said by the older people interviewed to have developed a reputation locally as ‘a fixer’ or somebody that ‘made things happen’.

• **the way they facilitated privacy**

  The third feature of successful community outreach was that, although it was a somewhat public event, efforts were made to ensure a customer could talk to the project worker about their financial affairs with a degree of privacy. This undoubtedly helped to overcome the barriers some might have to engaging with such services. For example, the project worker at Project C, a statutory initiative, conducted a roadshow in a general advice centre. Potential customers who entered the centre were approached and given a leaflet about the project’s services. If the customers was interested and had questions, they would then be offered the chance to go to a separate room where a private conversation could take place.

  However, it was not just physical space that communicated to customers that it was okay to disclose personal details. For projects such as Project G, a voluntary organisation, there was not always the space at the roadshow venues to talk to customers in private. In these cases, the key feature that facilitated the take up of project services was the interpersonal skill of staff. Here, it appeared that
project staff were so skilled in engaging customers in a discussion that this helped create a sense of privacy and intimacy even where one did not actually exist.

• their ability to enhance the reputation of the project

The three factors underpinning the success of community outreach described above are relevant whether the targeting event is held alone or with project partners. However, their role in increasing the status of the organisation was dependent on the involvement of key partners. In this respect, the reputation or ‘brand’ of some partners helped give a sense of credibility to the Partnership Fund project, where it was unknown to the customer. For example, staff from Project F, a carers initiative, talked about how they ran a roadshow in partnership with the local GP. This was seen as key to the success of this targeting approach because it was felt that all their clients trusted their doctors. Therefore, the message to potential customers was ‘if the doctor was willing to work with the project then why not me’.

5.1.6 Telephone advice

Over two-thirds of all projects in the survey described using the telephone as a way of targeting older people and also providing information to customers about the range of services the project had to offer. On the whole, project staff described using the telephone to make personal contact with the caller by introducing the project and briefly running through the key things the organisation could offer the older person. As was the case with community outreach previously, a key feature of telephone advice was that it enabled staff to first get the attention of customers and be able to respond quickly to any customer questions. For example, a customer from Project M described how when they were first contacted by a project by phone they almost hung-up thinking it was a cold caller. However, what was key in stopping them doing this was that staff were able to quickly introduce themselves and make a case as to why the service may be appropriate for this customer. These calls were a useful way of initiating contact which could be built upon if necessary with face to face meetings.

A further advantage of the telephone was it gave organisations a quick and easy way of introducing the funded project to existing customers who might not have been seen or heard from for some time. The telephone was seen to be a more personal way of doing this than sending written material. For example, staff from Project F, based within a voluntary sector organisation for all carers, talked about using the phone to get in touch with carers over 60 who had registered with them for general support in the past but who might now benefit from the specific support of the funded project which addressed the needs of older carers.

As well as the successful features of using the telephone, there were however two clear disadvantages. The first is that when the call is made the project has no idea what is going on for the customer. That is, when the initial approach is made by the project the customer may not be ready to discuss their financial issues
therefore some customers may not respond kindly to being targeted this way. The second disadvantage is that whilst the project is delivering services over the phone; staff are not able to pick up on any non-verbal cues that Chapter 5 will demonstrate are key to effective, responsive, project-customer encounters.

5.2 Intensity of targeting

Despite the extensive use of the wide range of targeting approaches described above, it was rare for projects to use specific targeting approaches in isolation. Therefore, the extent to which different methods were combined and sequenced is an important issue for discussion because it provides a way of explaining why an identical targeting method could have a very different bearing on outcome when used by two different projects.

It is clear from the accounts of project staff that the key advantage of combining multiple targeting methods was that they created a momentum or intensity to this aspect of the targeting process. Building one targeting approach on the impact of another created a level of intensity that had a clear bearing on the success of these methods in encouraging older people to engage with project staff. Across the case study areas, there was evidence of different degrees of targeting intensity.

Where an intensive approach was evident, a key characteristic was that these projects were mixing indirect targeting methods, such as leaflets and letters, with those approaches that involved direct contact with the potential customer (like a roadshow encounter or telephone call). Together, this mix of indirect and direct methods created a momentum that communicated to customers that the project was very serious in wanting to help them increase their financial position. In turn this helped to engage customers. For example, Project M, a community advice team, described how they successfully combined indirect targeting methods such as advertising on posters and prescriptions with direct targeting approaches. These included asking people when they are collecting their bus pass from the council, if they had heard about the range of benefits the project could provide help with. Staff felt that using these methods together within a key local setting increased the take up of benefits because it made the service personal in the local community.

Among other projects in the qualitative research, the use of pre-existing customer databases was the first step in building intensity upon which different approaches were carefully sequenced in order to achieve maximum impact. For example, in Project G, after a DWP scan of customer details was received, project staff phoned customers to offer benefits assessment. If contact could not be made directly by telephone the first time, a further call was made a week later. Only then would the project switch to an indirect method of targeting by sending a letter and leaflet advising customers that they offered a home visits service. This was all combined with well advertised and designed outreach events.
The effect is intensity is illustrated by the different approaches to sending project information through the postal system. Where this approach was highly successful the projects followed up the mailing with phone calls to potential customers to see if they were interested in speaking to a project worker about their circumstances. This was very effective for Project F. Staff estimated that this approach enabled them to work with 300 extra clients. Where it was unsuccessful, it was generally used as a sole method of targeting, without appropriate follow up with the customer. For example, Project E, a voluntary carers, initiative described how they mailed information to thousands of households in different areas but it resulted in a very low response. This is probably due to the fact that the message was not reinforced through any other targeting method.

5.3 How targeting methods evolved

A key feature of projects that work innovatively with hard to reach older people is their flexible approach that allows targeting methods to develop and evolve according to customer need. This was clearly a feature of the targeting strategy of Partnership Fund initiatives, with the case study projects describing various ways in which their targeting methods evolved. This reflected a pragmatic approach to targeting, where if something did not work, project staff would move on and look at another approach. Similarly, some targeting tools were adjusted and new approaches added throughout the Partnership Fund programme in line with how the project developed their knowledge of the target group or the locality.

While targeting approaches evolved to reflect staff views about effectiveness, this was not the only factor underpinning such change. The extent of a organisations capacity also affected a projects targeting approach. The resources available to projects, the expertise of staff and the extent of forward planning that occurred before the Partnership Fund project all underpinned this aspect of project capacity. A clear example of this comes from accounts of staff from Project F, a voluntary local carers service. Staff within this project talked about having an initial targeting strategy that involved phoning up potential customers to advertise the service. However, the project neither anticipated the level of demand for benefits services or had the capacity to deal with the influx of requests for assistance. Consequently, after making 100 phone calls, the projects approach shifted from a direct approach to use of indirect methods such as letters and leaflet mailshots. A further illustration of the impact of limited project resources on a targeting strategy comes from Project L, a service for older people with a specific sensory impairment. Here, staff from this project talked about initially doing weekly talks around the community about the services the project could offer. However, this approach led to a long waiting list for benefits advice meaning that the roadshow method was abandoned in the second year of Partnership Fund programme.

This chapter has described the range of ways in which projects targeted their potential customers and encouraged them to take up benefits and social care services.
The next chapter continues our exploration of project activity by examining what sorts of services the projects offered and how they were delivered to older people.
6 Delivering project services

The preceding chapter described the first aspect of the process of service delivery by mapping the different ways projects targeted potential customers for the Partnership Fund programme. This chapter focuses on the second aspect of how services were provided by describing the different ways in which projects and staff worked with older people to deliver a range of benefits and social care assistance. Three key features of the process are explored that have a bearing on the success projects achieved:

- the range and extent of services offered;
- customers’ reasons for working with the Partnership Fund projects;
- the way projects delivered benefits and social care support.

We saw in Chapter 5 that in many cases, the range of targeting approaches used was related to the circumstances of the projects and the needs presented by customers. These are important issues to consider throughout this chapter as they determined what services the funded projects provided and how staff worked with customers to facilitate the take-up of benefits and social care services.

6.1 Describing project services

Across the Partnership Fund projects there were two features of the service delivered to older people: providing benefits advice and social care services. The extent to which projects offered one or both of these services to customers varied widely. For some projects, their aim was to provide customers with access to a comprehensive benefit advice service that spanned the full range of welfare benefits. For other projects, the focus of their service provision was on particular benefits only. In some cases a more holistic service was provided to older people. As such, different types of benefits advice were combined, to a greater or lesser extent, with access to social care services that aimed to increase a customer’s quality of life. The reasons project staff gave for either providing benefits help alone or a mix of benefits and social care support are discussed in Section 6.1.3.

This section begins by exploring the differences in service provision and describes the impact this diversity had on achieved project outcomes.
6.1.1 The extent of service provision

The first feature of service delivery, providing older people with access to welfare benefits, was evident across most of the projects. There was, however, variation in whether benefits advice services were provided by the project or by their partners within the case studies. This depended on the individual organisation’s expertise and the suitability of their partner networks. Consequently, some projects were able to act as a one-stop-shop advice service for all welfare benefits whereas others had to refer customers to partners for help with all, or particular benefits. The survey also supports this showing that although 86 per cent of projects provided customers with benefits advice themselves, seven per cent had partners who provided this advice and seven per cent provided it jointly between them and their partners. The advice provided by projects covered the entire range of welfare benefits and is shown in Table 6.1. It shows that projects were providing most help with Pension Credit and Attendance Allowance. This is unsurprising given that increasing the take up of these two benefits was a core aim of Partnership Fund programme.

Table 6.1 Benefits advice provided by the projects

<table>
<thead>
<tr>
<th>Categories</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendance Allowance</td>
<td>155</td>
<td>93</td>
</tr>
<tr>
<td>Pension Credit</td>
<td>155</td>
<td>93</td>
</tr>
<tr>
<td>Carers Allowance</td>
<td>154</td>
<td>92</td>
</tr>
<tr>
<td>Disability Living Allowance</td>
<td>154</td>
<td>92</td>
</tr>
<tr>
<td>Council Tax Benefit</td>
<td>150</td>
<td>90</td>
</tr>
<tr>
<td>Housing Benefit</td>
<td>150</td>
<td>90</td>
</tr>
<tr>
<td>State Pension</td>
<td>130</td>
<td>78</td>
</tr>
<tr>
<td>Widows Pension</td>
<td>93</td>
<td>56</td>
</tr>
<tr>
<td>Other pension</td>
<td>28</td>
<td>17</td>
</tr>
</tbody>
</table>

Base: 167, multiple response

The second main feature of service provision was increasing customers access to a range of social care services. The variety and extent of this provision varied widely across the projects and covered five main areas of social care: help with mobility inside and outside the home, support with personal care; help with property advice, advice on home heating issues and legal/financial advice. The extent of this provision across each area is summarised in Table 6.2.

This vast range of services was facilitated by partnership working, without which projects could not have hoped to offer such varied sources of help and advice. However, despite the range of activities outlined, there was evidence to suggest that a few key types of services provided them. Four fifths (80 per cent) of projects referred to social services for this sort of help and support while just under three quarters (74 per cent) referred to large nationally recognised voluntary organisations, such as Age Concern.
Table 6.2  Extent of social care provision

<table>
<thead>
<tr>
<th>Mobility services</th>
<th>Personal care</th>
<th>Property advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refer or signpost to another organisation</td>
<td>Refer or signpost to other organisation</td>
<td>Refer or signpost to other organisation</td>
</tr>
<tr>
<td>75</td>
<td>77</td>
<td>73</td>
</tr>
<tr>
<td>Adaptations to home</td>
<td>Other help or advice on this issue</td>
<td>No help or advice given</td>
</tr>
<tr>
<td>18</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>Transport and mobility services</td>
<td>Social support and assistance</td>
<td>Home security</td>
</tr>
<tr>
<td>16</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>No help or advice given on this issue</td>
<td>Accompaniment on trips out</td>
<td>Refers customers to care and repair agency</td>
</tr>
<tr>
<td>9</td>
<td>7</td>
<td>10</td>
</tr>
<tr>
<td>Blue badge parking</td>
<td>Meals on wheels</td>
<td>External maintenance</td>
</tr>
<tr>
<td>8</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Other mobility help</td>
<td>No help or advice given on this issue</td>
<td>Fire safety</td>
</tr>
<tr>
<td>7</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Tools to help with tasks (e.g. special taps)</td>
<td>Personal care (e.g. help with washing/bathing)</td>
<td>Decorating and internal repair</td>
</tr>
<tr>
<td>7</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Home assessment for accident prevention</td>
<td>Housework</td>
<td>Other property maintenance advice</td>
</tr>
<tr>
<td>2</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Heating services</th>
<th>Legal advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refer or signpost to other organisation</td>
<td>Refer or signpost to other organisation</td>
</tr>
<tr>
<td>75</td>
<td>60</td>
</tr>
<tr>
<td>Insulation</td>
<td>Debt</td>
</tr>
<tr>
<td>12</td>
<td>22</td>
</tr>
<tr>
<td>Advice on keeping warm</td>
<td>Housing</td>
</tr>
<tr>
<td>11</td>
<td>17</td>
</tr>
<tr>
<td>Central heating/central heating grant</td>
<td>No help or advice given on this issue</td>
</tr>
<tr>
<td>11</td>
<td>15</td>
</tr>
<tr>
<td>Advice on winter fuel payment</td>
<td>Other financial/legal help</td>
</tr>
<tr>
<td>10</td>
<td>14</td>
</tr>
<tr>
<td>Information on low carbon technologies</td>
<td>Utility bills</td>
</tr>
<tr>
<td>9</td>
<td>13</td>
</tr>
<tr>
<td>Other help</td>
<td>Consumer advice</td>
</tr>
<tr>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>No help or advice given on this issue</td>
<td>Neighbour disputes</td>
</tr>
<tr>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>Replacing old boilers</td>
<td>Equity release</td>
</tr>
<tr>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Double glazing</td>
<td>Immigration</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Meters</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

6.1.2  Where service delivery took place
The projects delivered this benefit and social care assistance in a diverse array of places. This encompassed three distinct types of environment: their own
organisation’s venues, those of partners and the customer’s home. The range of
different venues offered by organisations is covered in the Chapter 4, while the
variety of different partner locations is covered in Chapter 5. This section explores
why some projects delivered their services in customer’s homes and how this
environment had a bearing on outcomes.

There was a general view amongst customers and staff that working with older
people in their homes was an important and effective place to deliver project
services. Sixty five per cent of projects were providing home visits. They did this
because of their apparent effectiveness in getting access to a group of people who
otherwise would be outside the reach of the organisation. This included people
who were housebound due to a range of health and age-related conditions and
some people in rural areas who were isolated due to a lack of public transport.
The value of home visits to carers was also recognised. Without being able to take
the service to the customers’ home, some staff found it difficult to see how the
customer would have the time to attend a meeting at the project offices.

Alongside providing projects with access to hard to reach older people, there were
two key characteristics of the customers home that made this an effective place
to work deliver services. The first was that they facilitated private, confidential
conversation. Given that the literature on barriers to services discusses the
environment of some statutory agencies preventing some older people seeking
support, home visits were a clearly an effective way of overcoming this hurdle.
For example, a customer from Project G, a statutory general service, said that
receiving a home visit from the project worker was a very different experience to
having to go to their local benefits office for help:

“Well you’re at home aren’t you, you’re homely in your own atmosphere and
everything… I don’t like talking over a counter to people. Over in their office
she sat at a table and I couldn’t let meself go like that, but being at home in
me own surroundings, yeah [it made a difference].’

(Project G, customer)

Second, the privacy that home visits created was said by staff to help increase the
older person’s confidence in the encounter. ‘Being on their own turf’ or in their
‘own space’ was felt to put the customer at ease and thereby increase the chances
of them opening up and engaging with the project worker.

In addition to being a practical environment for some older people that facilitated
privacy and installed customer confidence, home visits were also used by some
project staff as a way of assessing the extent of a customer’s need. The range of
different ways staff did this are explored in Section 6.3.

6.1.3 Rationale for service provision

We know from the survey that projects varied widely in the type of benefits advice
provided and the way in which this support was sometimes combined with access
to social care services. This section explores the three key reasons why some
projects focused on benefits during the Partnership Fund programme and why others provided a more holistic service. These were related to:

- the expertise of the project;
- its knowledge of customer need;
- the project’s understanding of what it could offer.

**Project expertise**

The extent to which a project felt confident in providing benefits advice was a clear motivation for some to deliver benefits advice. The experience of helping people to successfully claim particular benefits over a number of years led to some projects to feel that they had the necessary expertise to do this type of work and, undoubtedly, engendered a confidence amongst the staff. In turn, it was felt by some that their confidence in working with particular benefits would transfer to the customer receiving the service and thus help keep the older person engaged with the process.

Having the expertise to advise on particular benefits also helped projects retain a degree of self-sufficiency that facilitated fast, effective service delivery. For example, staff from Project F, a carers support service, spoke of being very experienced and skilled in making claims for Carers Allowance. This meant that they did not have to consult partners that could also take up valuable time in dealing with a case.

**Knowledge of customer need**

Understanding the needs of the local population underpinned why some projects focused their work on particular benefits. Understanding that there was this generic need to financial support in the community led some organisations to try to cover access to all benefits. For example, staff in Project J, a general advice service, described the local population as predominantly working class people who had worked all their lives claiming very little social support. Consequently, the need for a benefits service that went out into the community was perceived by staff as vital because they felt that older people in their community were too proud to approach official agencies for financial assistance.

A further reason for some projects to focus their work on particular forms of financial support was the success they had experienced in increasing the take up of these particular benefits in the past. This was important because it gave projects a way of focusing their limited resources on areas where they felt they were most likely to have success and thus achieve their aims and objectives. This had an effect on the degree to which Pension Credit was prioritised by some projects. There was some belief, particularly amongst those from established projects, that the
campaign the Pension Service Local Service (PALS) had exhausted Pension Credit take up locally\(^5\). The rationale for this varied across the projects concerned. It was, for some, a strategy that was prompted by their knowledge about the success locally in reaching the older people who are eligible to make a claim for Pension Credit. Alternatively, not focusing on Pension Credit was justified by the belief that there existed a bedrock of older people locally who are eligible for Pension Credit but have no interest in claiming it, whatever the efforts made by local services. Whatever the rationale, these projects focused their main efforts throughout the Partnership Fund on the take-up of other benefits, although they did pick up Pension Credit applications where they came across them. Nevertheless, not all projects were so confident about placing their local knowledge above the stated aims of the Fund. Despite the belief that there was a low demand for Pension Credit in their area, they continued to focus on it in their service delivery efforts because of a concern that this might affect their funding.

Where an organisation’s focus was on combining benefits with access to social care services, the circumstances of particular groups of older people was the motivation for some. Here, accurate knowledge of the circumstances of customers’ lives was vital in aligning particular benefits and social care services to salient issues within the target population. For some projects, the key issue underpinning this holistic provision was that it was recognised that increasing customers’ finances was not the only issue to address. For example, Project I, a voluntary local organisation working with South Asian older people recognised that the majority of their customers had spent their working lives employed ‘ unofficially ’ in restaurants. Consequently, the majority of their customers did not have pensions which led to a clear need for Pension Credit provision. As many of the customers within this project could not speak English, staff also specialised in facilitating a range of social care services by enabling customers to communicate their needs to partners and facilitating partners in their articulation of their service offer.

Project capacity

Chapter 4 described how the different patterns of funding organisations received had implications for how stable projects felt that they were. Consequently, this had an impact on the capacity of some projects, and this was clearly a reason why particular some services were provided to a greater or lesser extent. For example, for some projects that were established with stable sources of finance, Partnership Funding was utilised to extend the range and scope of an existing holistic service to new, sometimes harder to reach populations. In contrast, amongst other projects who described the funding they received as enabling them to ‘live from hand to mouth’, an existing service was often continued without any changes to the extent of provision. That is, if the project was a benefits only service before the Partnership Fund, this is how it remained throughout the programme.

\(^5\) In fact, recent figures show that the take-up of Pension Credit by the eligible population is between 60 and 69 per cent. This equates to between 1.1 million and 1.7 million pensioners who are eligible and are yet to claim Pension Credit (Source: Pension Credit Estimates of Take-up 2005-06, DWP, 2007).
6.2 Customer motivations and expectations

Understanding the engagement of customers by funded projects necessitates a closer inspection of their motivations and expectations. These are explored in this section.

6.2.1 Motivations

Understanding how different customers were motivated to take-up their benefits is an important issue for discussion as it provides key information for service providers on the optimum way to encourage, target and initially work with hard to reach older people. It is clear from the previous literature on barriers to the take up of benefits, and from the accounts of project staff that some older people feel embarrassed or a sense of shame when seeking financial assistance. This sense of embarrassment also seemed to be an issue when customers interviewed were asked to talk about why they chose to take up the offer of benefits assistance from their Partnership Fund project. Consequently, some customers were less able or perhaps felt less comfortable discussing their reasons for engaging with projects.

Where customers did discuss their motivation for deciding to work with project staff, it centred on three key issues:

• to gain financial support

Where customers talked about coming to a point where they realised that some financial assistance would be helpful to them, this was clearly not an easy decision for them to take. Underpinning this issue for some was a feeling that asking for assistance was the first step towards a loss of their independence. This seemed particularly pertinent to some of the older customers interviewed who felt that, having managed alone for so long it did not feel right to them to now be asking for some help.

However, the recognition that existing finances or savings were not sufficient was a key motivator for engaging with the service. For example, a customer from Project J, a general service, spoke of seeing the little bit of money they had in the bank going down and down and realising how it was getting harder and harder to manage. However, this customer also provides support for ‘pride’ as a key barrier to service take-up, even when their financial situation was becoming critical:

‘I had to push myself to go that day…I felt I was putting on specially when I had that little bit of money in the bank like…I hesitated [because] I’ve never had anything for nothing (laughs), that’s why.’

(Project G, customer)

• to maintain independence

Among other customers, recognising the need for help was driven by the understanding that deterioration in their physical health meant they could not continue to manage on their own. Subsequently, some people recognised
support was essential if they were to remain living independently. For example, one customer from Project C, a statutory organisation, talked about seeing their health deteriorate in the same way as their father's. This was key in motivating her to ask for a stair-lift to be fitted in the home:

‘[My father] had arthritis and this is where it all comes from you see and he was chronic with it in his knees and...he finished up living downstairs. I looked after him...but when he was upstairs I've seen him actually crawling up the stairs. Now if you can get something that will help you get over crawling up stairs then you should have it irrespective of what it looks like.’

(Project C, customer)

Deterioration in the physical health of relatives, particularly when the customer was the primary carer, was also a powerful motivation for some to seek help. For some people in these circumstances, caring for a relative had placed them under enormous psychological strain and there was thus the recognition that they needed some support if they were to be able to continue to provide adequate care for their relative.

- **curiosity about what the service could offer**

The third factor motivating customers to engage with services was curiosity. Customers talked about a range of things that made them curious about the project. For some, there was a desire to know if the project could do anything to help them and this was often accompanied by a ‘I've got nothing to lose’ approach. For others, where the project was located and how it was presented made them curious about what the service was all about. For example, a customer from Project A, an initiative offering benefits assessment on inner-city street markets, described how seeing the projects amongst all the other regular market stalls made the project stand out and the customer wonder what it had to offer. Further evidence on how the environment stimulates curiosity comes from Project C. This local authority project began providing one aspect of its service from a mobile bus. One customer who used this service described seeing the bus parked whilst out shopping and ‘being nosy’, went over to take a look.

However, despite the different things that customers described that made them curious, it is unlikely that this was always the genuine motivation for them to approach the project. Rather, it is likely to illustrate customers own reluctance to portray themselves as someone in need. It is very possible that they talked about their motivation in this way, because even in the interview situation, it seemed more socially acceptable than appearing needy. Therefore ‘curiosity’ may well be masking the actual issue that motivated these customers to work with project staff. The impact of ‘curiosity’ on service take-up was clearly understood by project staff. As such, a variety of different targeting approaches were developed by projects that aimed to capture the attention and stimulate the curiosity of potential customers. For example, staff from Project G, a local authority initiative, talked about how they would offer older people a range
of free ‘tasters’ such as fruit kebabs during roadshows. Staff felt that saying ‘come on down to the roadshow and get some food’ was a very effective way of enticing people to see what the service had to offer.

### 6.2.2 Expectations

Irrespective of what the customer’s motivation was, they generally had low expectations of what the Partnership Fund project could do for them. This view was sometimes based on previous experience of statutory and voluntary sector service providers. Alternatively, it illustrated how distant some people were from public services – they seemed to have been out of reach from public services for so long that they expected nothing from the service or indeed the state.

### 6.3 Delivering the service

Given the low expectations of project customers and the reticence of some to work with service providers, staff clearly had much to do if they were to be successful in engaging older people and to convince them to work with the project. This section therefore explores the range of skills and techniques utilised by project staff to engage older people throughout the service encounter(s).

There were six key features of how staff across the case study areas worked with older people to deliver benefits and social care support that had a bearing on the actual take-up of these services. These encompassed:

- explaining to customers how the process would take place;
- structuring customers’ expectations about what the project could do and how long the process may take;
- assessing the customer’s need for benefits and social care services;
- completing the benefits application form with customers;
- sign-posting or referring customers to other services where a need had been identified;
- following up the customer once the application has been submitted.

Figure 6.1 shows the key issues within each stage of the service delivery process covered in the remaining sections of this chapter. There are two key advantages in describing how services were actually provided to older people. First, they demonstrate how methods and approaches were tailored according to the different circumstances of the projects and the needs of their customers. Second, exploring the range and extent of techniques utilised provides a map of what works in delivering benefits and social care services to hard to reach older people.

Before going on to describe these different stages, it is worth noting two issues about the time taken to complete the process with the customer. The first of these relates to the length of time it took to complete the whole process. The evidence collected suggests that this varied considerably according to the needs
presented by the customer. For example, with one customer, the first five phases of service delivery could take place in one meeting, with follow up happening sometime after. Going through the whole cycle with another could take up to ten meetings. Staff from Project C, a local authority initiative targeting minority-ethnic communities provide a clear illustration of the influence of customer need on the number of service delivery encounters. When working with South Asian customers was described, staff spoke of how some of these customers would size the project up at the first meeting with very little benefits-business being discussed. At subsequent meetings, customers would then start to open up and give more information at each separate encounter. Consequently, staff were aware that there could be many meetings before any benefits were applied for.

The second issue relates to the duration of any one encounter with a customer. Here again there was considerable variation across the case study areas. Some encounters – whether by phone or in person – were short. Others, usually face to face, were very resource intensive, particularly where they involved a home visit. Staff across the different case study areas consistently described home visits that took two, or sometimes, three hours. The length of appointments could, of course, be a sign of inefficiency. However, there was little evidence to support this. Instead, it was clear that time was a critical factor in overcoming customer anxiety the project, the staff or the objectives of the encounter. Project workers underlined the importance of time in putting the customer at ease, in helping to develop rapport and in completing sometimes lengthy claim forms at a pace that allowed the customer to follow along. In short, appointments were sometimes as long as they needed to be to ensure that customers left the encounter with the project feeling that they had been listened to, had their questions answered and were not rushed.

Customers were unanimous in their view that having adequate time was a valuable part of the service. For example, a customer from Project F, a carers service, spoke of how the project worker was happy to listen to stories about him and his partner and that the worker always let him talk. This in turn made him more open about his support issues. The view of another customer strongly supports this view:

‘Cos he’s (the project worker) got a manner…he didn’t rush away. Because there was one [here] earlier, a girl, [not from the funded project] she came, and she rushed in…She wasn’t doing the job properly.’

(Project H, customer)
Figure 6.1  The process of service delivery

1. Introduction and explanation
   - staff style
   - seating arrangements
   - range of methods used
   - explaining eligibility

2. Structuring expectations
   - mapping the road ahead
   - length of time involved
   - realistic assessment of outcome

3. Assessing customer need
   - range of methods used
   - home visits
   - sequencing provision

4. Benefit application
   - ability to engender trust
   - approaches used

5. Direction to appropriate services
   - consent for referral
   - identifying and making arrangements for contact
   - sign-posting to other organisations

6. Customer follow-up
   - range of methods used
6.3.1 Introductions and explanation

This section describes the first feature of customer meetings with project staff, exploring how the service and meeting was introduced and explained, and how this varied according to project circumstances and customer needs.

The opening stages of a customer’s encounter with the project were key to how the remainder of the meeting went. This was due to it being the time when customers often got their first view of project staff and when they assessed whether the meeting, and working with the project per se, was going to be worth their while.

There were four key features of an effective staff introduction:

- the language and style of the staff;
- where the worker placed themselves in relation to the customer;
- techniques used to hold the customers attention;
- how eligibility was explained.

**Staff style**

The accounts of project staff suggest that there was no right style to adopt with older people when introducing themselves and the project. The key issue underpinning an effective staff – customer introduction and subsequent interaction was whether that the manner adopted by staff was appropriate for the older person concerned.

The language staff used to introduce themselves was a key aspect of an effective introduction. This was sometimes used to create a relaxed, pleasant atmosphere that put the customer at ease. Where it worked well, it was clear that project workers possessed strong social and communication skills that enabled them to endear themselves to customers almost immediately. For example, one member of staff from Project E, a voluntary local project supporting carers, described how they would almost immediately talk about how they worked for a charity and as such was not an official but ‘just like them’. To support this view, a customer from Project A, a voluntary local advice service, spoke of how talking to the project worker was ‘like talking to one of your mates on the market’. Together, this use of an informal style worked to the advantage of projects and almost set them up as a friend of the customer rather than someone who was there to provide a service to them.

How staff presented themselves was also a key feature of establishing this sort of informal atmosphere and putting customers at ease. It was felt by some that not being formally dressed was another key way of sending the message that this was going to be a relaxed, pleasant meeting. It was important for some project workers to distinguish the event from any previous encounter the customer may have had with a statutory service. For example, the manager of Project M, a general advice service, discussed how not being dressed in a Pension Service uniform moved the project away from being seen as a official service thereby creating a informal atmosphere.
This informal language and appearance was not always deemed to be appropriate however. Therefore, success could hinge on a quick reading of the circumstances and generating the appropriate response. Consequently, staff from some projects used quite formal language throughout their encounters with customers because they felt this was expected by the older people concerned. It was seen to be a way of communicating respect and thereby winning trust. For example, when hoping to discuss the financial affairs with South Asian men, a worker from Project C, a statutory agency working with this group, described how humour wasn’t really appropriate in these encounters. Rather, showing respect and a seriousness about the customers finances was the appropriate way forward. By contrast, he felt that there was room for a ‘lighter approach’ when working with South Asian women. Here this project worker discussed more opportunity for humour, and generally keep the meeting a little more light hearted.

**Seating arrangements**

As well using appropriate verbal communication and dressing appropriately, how the space was used between the project worker and customer was an important feature of the opening exchanges as it also helped create a relaxed environment that sent a message that the encounter was going to be collaborative. In turn, this helped customers feel that their input was to be valued and that the meeting was not simply going to involve staff ‘talking at them’. In the observations of home visits it was typical for the staff member and customer to sit on separate chairs but the worker would generally aim for them to be quite close to one another, moving furniture if that was required. This was a powerful way in the intimate and private nature of the meeting was reinforced. This use of chairs close together in customers homes was another way in which staff sent the implicit message that they were more of a friend than an official visitor. That is, friends having a private conversation do not tend to sit a long way from each other.

When the service was provided at the project offices, staff used space differently but just as effectively to create a private, collaborative environment. For example, customer meetings in Project A, a voluntary local initiative, took place in a general office with one desk and chairs for staff and the customers. Again, how this space was used was key to facilitating an effective staff-customer dynamic. In this case, the customer was sat not behind, but at the side of the desk so that they were close to the project worker and could see what was being written at all times.

Using a general office to deliver services also meant that the use of space by some staff was so effective that it obviated the need for complete privacy. Consequently, when cleaners and other staff would sometimes enter the room during the encounter, this did not seem to worry the customer or break the flow of the conversation in any way.

**Methods used**

Projects used a variety of methods to get the clients attention and ‘hook them into the service’. Project staff described using a range of printed material, such as leaflets or posters on office walls, or in one case a ‘pensions encyclopaedia’
to help them explain to the customer the benefits and service delivery process. The printed materials utilised were produced nationally by The Pension Service or locally by project. For example, Project C, a statutory initiative working with minority ethnic older people discussed how they would show customers leaflets, translated into a range of South Asian languages, that described their service and highlighted the benefits and amounts the customer may be entitled to.

Projects also used other methods to capture customer attention. For example, staff in Project A, a voluntary local initiative, had developed a computer programme to be used on a mobile hand-held device that allowed them to assess customers eligibility for Pension Credit in two minutes. Staff from this project saw use of this method as a key way of attracting clients because it was so immediate. When service delivery was taking place at locations such as roadshows, where some projects did not have lots of time to spend with the customers, use of printed and electronic methods were seen as a very effective way of quickly making the customer aware of the key benefits for them.

The use of methods to engage customers was not always appropriate. When customers began to tell relevant personal stories about their life, such as how a partner passed away or how their own mobility had deteriorated, it was felt that reaching for a project leaflet could send the customer the message that the project worker was not fully listening to what was being said. In this sense, giving the customer complete personal attention was used to communicate respect.

How eligibility was explained

As has been discussed throughout this and other chapters, customers presented with a number of barriers that had to be overcome throughout the encounter if the meeting was to be successful. The key barrier that was seen as important by staff to address at the early stages of the encounter was overcoming shame about claiming benefits and social care assistance. For example, in Project I, a voluntary local initiative working with Asian people, staff described how their customers would feel particularly guilty about claiming financial support because many of them had not lived in the United Kingdom (UK) and thus paid taxes when they were working. To overcome this issue, project staff would tell customers that the government was funding the Partnership Fund and therefore wanted older people to claim all the support they were entitled to. Staff described how on hearing this news, customers tended to feel happier and subsequently less of a burden on the project and drain on the economy. Staff in Project E, a voluntary initiative funding carers, talked about how the circumstances of their customers meant that they overcame this barrier in a completely different way. Here, project workers spoke of how they would tell customers that they had paid taxes all their lives and thus had contributed to and therefore deserved the financial support that they were now due.
6.3.2 Structuring customer’s expectations

The next part of the process of service delivery concerned structuring customers’ expectations about what they could expect from their encounter with the project. Being fair and open with customers by not giving people false hope underpinned this way of working. This was seen as particularly important where some customers had been away from official service provision for some time. In such cases, staff were mindful that raising but not meeting expectations during the Partnership Fund project may keep customers away from services for good.

Staff described three key features of how customers expectations were set during a service encounter. These encompassed:

• providing the customer a clear map of the work involved that would be involved in meeting their needs

Telling customers what was going to be required of them in order to make a benefits application was a key part of structuring expectations. Here, staff were acutely aware that some customers were reticent about discussing their financial affairs. As such, project workers recognised that it was important and fair to inform the customer that such a discussion would be necessary at some point in the encounter. Here, the skill of project staff came to the fore when they described various ways in which they reassured customers at this point, such as telling them ‘whatever you say to me today, stays in this room’. Staff from Project H described a different way, visually, mapping the work that would be involved in the service delivery process. In this case, due to the extensive needs brought on by customers having a range of mental health difficulties, staff described drawing up a paper work-plan for customers. This document was seen as an effective signposting tool because it showed customers all the other services that they may come into contact with as a result of working with the project.

• giving customers a sense of how long claiming benefits or accessing social care services may take

Giving customers an estimate of how long the process of claiming benefits or accessing social care services would take, underscored the need for the customer to make an informed decision about whether they wanted to continue with the process. Here, benefits and social care expertise was key in enabling project workers to be aware of the different periods of time particular benefit applications, or types of social care service, actually took to reach a conclusion. For example, in Project C, a statutory initiative targeting minority ethnic communities, described how they would tell customers about the length of the sessions, how many sessions would be needed and the type of information that was going to be required and discussed. A customer who received help from Project C supported this way of working. Here, the project was working with Social Services in order to make some improvements to the older person’s home. Consequently, the customer described how the project told them that the process would take months and that they should not expect...
to hear anything for at least four weeks. This turned out to be the case and prevented the customer from worrying what was happening when they were not receiving many progress updates.

- **providing customers with a realistic assessment of the likely outcome**

Providing customers with a realistic sense of the likely outcome of their application for benefits or social care services was the third way in which projects structured customers' expectations. This approach served two functions. First, it allowed the project to establish a fair and honest relationship with the customer from the outset. Second, providing an estimate of the anticipated outcome also prevented staff from setting the project up to fail. This seemed particularly necessary when projects were working with older people who had not been in contact with services for some time who may have had unrealistic expectations of what the project could deliver.

### 6.3.3 Assessing customer need

As well as structuring expectations about the encounter, staff used the early exchanges with customers to further understand the range and extent of customers' needs. It is clear from this and preceding chapters that Partnership Fund projects were working with customers with a diverse array of needs. As such, project staff described three ways in which customer's circumstances were assessed. These encompassed:

- employing different methods to facilitate the assessment;
- using the customers' home as an active assessment environment;
- sequencing the provision of services.

**Methods used**

There were two key methods that project staff utilised in order to assess the older person's circumstances and requirements. Underpinning both was that they gave customers the message that the staff, and the Partnership Fund project were on their side. These were the use of probing, respectful questioning and self-disclosure.

Across the projects, staff were aware that some customers would be reluctant to discuss their personal circumstances. Consequently, staff described and were observed using a range of open and closed question in order to probe the customer for vital information. However, the key issue underpinning the success of this approach was how the questions were asked. As such, staff would often prefix personal questions with statements such as *'I know this is difficult for you but...‘*, *'I'm sorry to have to ask you this but‘*, and *'I'm not interested in the actual amount of savings you have, I just need an estimate‘*. As well as being an effective way of gleaning personal information from the customer, this approach also showed how the project was openly acknowledging the intrusive nature of some of the issues discussed.
As well as using a range of probing questions, some staff described using an element of self-disclosure in order to put the customer at ease and enable them to open up. This also served to reassure the customer that the encounter was collaborative and that the project staff ‘were just like them’. For example, staff from Project K, a local authority initiative, described how they would say to the customer ‘I get out around the house like this, how do you manage’? A further form of self-disclosure was how some staff would give some personal information about their family background as a form of quid-pro-quo before they had to ask the customer such questions.

**Home visit**

Alongside the two methods of assessing need, the setting in which some services were provided was key way of ascertaining the current circumstances of customers. As such, when home visits were utilised this was seen as a particularly useful environment to work with older people. Alongside this being a private and comfortable place in which project services were delivered, being in a customers home also enabled staff to conduct a live assessment of an older persons eligibility for benefits and social care services. In particular, a recurrent theme from the accounts of staff was that home visits allowed for an accurate assessment of a customer’s mobility. Being in the customer’s home enabled staff to ascertain assessment criteria in a non-threatening and non-intrusive manner. For example, staff from Project M, a community advice team, described how early in the encounter they would ask the customer if they wanted a drink. When the client invariably got to their feet to help with this task, staff could then see how steady a person was, or if they used any aids such as a walking stick. If a stick was used, or the person was unsteady on their feet, these issues when then followed up in a way that did not make staff seem as though they were directly asking about the topic. For example, questions such as ‘oh I see you use your stick to walk, how long have you had to do that’ were used to keep the interaction as non-threatening as possible. Customers from this project provided support for this approach when they described how they felt okay during the service encounter as staff just seemed to ask them everyday questions about everyday things.

**Sequencing provision**

As a result of the initial assessment of need, the next step for some projects was to sequence the provision of benefits and social care services. Amongst some projects the needs of their clients were so acute that staff described sequencing the provision of benefits and social care help in a particular way in order to maximise the impact of these services for the customer. For example, staff from Project D described how the key need for their homeless clients was to get them money so that they could pay for some temporary accommodation that in turn may lead to the opportunity of finding a stable fixed address. As such, staff described that whilst recognising that these customers also had a range of social and mental health needs, it was important to first maximise their income in order to try and keep them safe by getting them off the streets.
Even when customer needs were not as acute as described above, some customer’s circumstances were such that some projects were completing multiple benefits applications for one customer. As such, some staff described carefully sequencing the completion of some benefits forms because success in one particular application directly influence the success of others. When discussing their experiences of the benefits system, this was one of the most confusing aspects of the process for customers to understand and where they particularly valued the guidance, skill and support provided by project staff. This in turn seemed to decrease the anxiety some older people felt when faced with a large pile of application forms.

Depending on the outcome of the needs assessment, some customers were supported in making a benefit application, described ahead, and then directed to other appropriate services. In contrast, if the customer was not assessed as eligible to receive benefits, the next stage of the service delivery process for some was direction to appropriate services. This is illustrated in Figure 6.1.

6.3.4 Benefit application

When discussing how the various benefits forms were completed during the Partnership Fund programme, there were two core features that influenced how successfully this was done:

- developing customer trust;
- use of methods according to benefit type and customer need.

The ability to engender trust

Across the projects in the qualitative research, a recurrent theme from customers was how the skill of project staff helped to make applying for benefits seem like a trouble free, pleasant experience. That customers felt that they could trust the project worker to do a good job on their behalf contributed to them feeling confident about sharing information with staff and thus the Partnership Fund project. For example, one customer from Project K, a statutory service for all older people, described how they had previously sought help about their benefits from a voluntary organisation but felt they had received a very bad service. Contrasted with the Partnership Fund experience, the customer described how pleasantly surprised they were that the staff member came and sorted out their problems straight away. In turn this gave the customer confidence in the project.

Methods used

When project staff described how benefit application forms were completed, it was clear that the effective use of space, at the outset of the meeting described earlier, was vital for form completion to go well. Presenting the form completion process as something that was to happen collaboratively with the customer was the key feature underpinning this approach. A further advantage of this way of working was that it created a sense of privacy at a point in the process when the customer was sharing very personal information. Consequently, forms were
sometimes completed in an intimate atmosphere, with both project worker and customer gathered round the form asking each other questions. In addition to the effective use of space, the use of probing questions asked in a respectful way was also key during form completion.

As some service encounters could last a considerable length of time, staff were mindful that customers might struggle to concentrate or retain their interest in form completion for that period of time. Consequently, this part of the process was sometimes punctuated with staff anecdotes that helped lighten the intensive atmosphere. In addition, the offer of drinks, or breaks, was seen as key to helping the customer remain focused.

The approach of staff sometimes varied depending on the nature of the benefit application. For example, when projects were providing Pension Credit or Council Tax Benefits advice where more general information was required, there was a tendency for staff to be somewhat more light-hearted in their approach, using humour as a way of probing customers for detail and keeping customers interested in what could quite easily turn into a somewhat tiresome process. This approach was not, however, always appropriate. For example, when staff were completing AA forms where the issues at hand were of a serious and personal nature, they were keen to demonstrate to customers that they understood the seriousness of the matter. In addition to the methods used to assess need for this benefit described above, some staff would be very open about how they managed various tasks in order to make sometimes abstract questions meaningful for the customer. For example, a staff member from Project K, a statutory service for all older people described how they would say ‘I sometimes get out of the bath in this way, what do you do?’ Consequently, as well as helping understanding the different questions, this level of openness gave customers the message that it was not just them who was disclosing personal information and thus fostered a collaborative working environment.

In addition to how approaches to form completion were tailored to different benefits, staff also described working in different ways that depended on their perception of customer need, specifically the time customer’s needed to absorb and make sense of the facts and options presented, and their literacy or numeracy needs. Project staff were clear that tailoring their approach in this way was vital if the information was to be gathered from customers in a respectful, collaborative manner. As such, staff were acutely aware that they should never work in a way that patronised their customers and therefore tailored their approach accordingly. For example, staff from Project D, a voluntary local initiative working with homeless older people, discussed how even though they were aware of poor literacy within this community, when completing the benefits forms it was inappropriate and threatening to ask the customer if they ‘could read and write’. Consequently, staff described how they would ask customers ‘if they would like them to fill this in for them’ and once this barrier was overcome, they were able to draw pictures and diagrams explaining the claims process for the customer.
6.3.5 Direction to appropriate services

As well as gathering information required to complete benefits applications, some staff were also assessing the customer for social care needs that could be met by their own or other organisations. For some projects, this was a key part of providing an holistic service to their customers and covered the range of services described in Table 5.2.

Sign-posting older people to other organisations, but making no firm plans for follow-up was one way in which customers were directed towards social care provision. Again, there was a difference across the projects in the way this occurred. For example, some projects discussed and were observed giving customers a rich description of what other service providers could offer. This was supplemented with printed material containing further service information and details of how the organisation could be contacted. In contrast, other projects simply provided customers with written material about the project. This lighter-touch approach undoubtedly gave the customer more control over the decision to access the service. However, it also meant that they were less supported in doing so.

Getting consent for and arranging referrals to other organisations was a more active and supported way in which customers were directed to other services. Customers were introduced to potential services during a face-to-face service delivery encounter. The advantage of this approach was that it enabled staff to get a sense, both verbally and non-verbally, of the customer’s interest or willingness to be referred. In addition to the face-to-face approach referral approach, some projects would also phone or write to the customer to seek consent for referral to social care provision. Once consent had been received, staff could make the necessary contact with and request help from other organisations.

6.3.6 Customer follow-up

Following-up customers was the final part of the service delivery process. This was important in reinforcing to the customer that the project was serious in trying to increase their access to benefits and social care service and was not just going to go away once the claim was submitted. In turn, this further helped install customer confidence in the service they were receiving.

Projects described following-up customers by letter, phone call and/or in person in order to quickly ‘touch base’ with the project to either give them a progress update about a benefits application or ask the customer if they had received a letter telling them the result of the claim. However, irrespective of the method used, staff felt that constant contact was helpful in keeping customers motivated, which in turn retained their interest in the service. This aspect of the personal service projects provided alongside the ways of working described throughout the section, led to some customers speaking about project staff in very affectionate terms. When discussing their opinion of project staff, customer spoke of workers ‘always giving them 100 per cent’ treating them ‘better than their families do’ and generally, ‘always seeming to really care’.
This section has described six aspects of the staff-customer encounter that had a direct bearing on the take-up of benefits and social care services. This learning has important implications for what services are offered to older people and how they are provided. The diversity of practice described within and between different groups of people means that it is not helpful to have a one size fits all approach when attempting to increase benefit take-up and access to services. Different needs mean different patterns of sequencing benefits and social care services. Also, individual circumstances require different approaches at different times. Again, there is no manual of exactly what should be done for all older people or people from particular populations. Rather, staff need to have an extensive tool kit of skills which they can draw on to adapt to the different people they encounter.

This chapter has described the various kinds of different services provided to older people via the Partnership Fund and, perhaps more importantly, the way in which they were delivered. The next chapter looks at the third and final aspect of project activity: partnership working.
Chapter 7  Partnership working

This chapter examines the partnership working between projects funded by the Partnership Fund and other organisations, including the Pension Service Local Service (PSLS). It describes these partnerships, attempts to understand the reasons for their differences, and evaluates their effectiveness.

The first section of the chapter describes the extent of partnership working between projects and partner organisations. Subsequently, the relationships between Partnership Fund projects and the PSLS are dealt with separately because there were differences in the ways in which they worked in partnership. Moreover, their relationships were underpinned by different factors and played out in different contexts. To this end, sections two, three and four concentrate on the relationship between projects and other community organisations while the final section is devoted to the characteristics and effectiveness of partnership activity with the PSLS.

It may be anticipated that the Partnership Fund would have at its core a common understanding amongst participating organisations about what it means to work in partnership. This was not, however, the case as becomes clear in the following discussion: organisations understood the concept of partnership quite differently and this was reflected in the way they conducted their relationships. The terms ‘partnership’ and ‘partnership working’ are used throughout this chapter to refer to any stated collaborative relationship between organisations.

### 7.1  The extent and nature of partnership activity

How ‘partnership’ manifested varied for different projects and partner organisations. This section explores these differences and describes the extent and nature of partnership working observed.

#### 7.1.1  The extent of partnership working

Partnership working was evident across most of the funded projects. More than three-quarters of the projects surveyed (78 per cent) reported that they worked in partnership with another organisation.
Table 7.1  Number of project partners by duration of Partnership Fund funding

<table>
<thead>
<tr>
<th>Categories</th>
<th>12 months</th>
<th></th>
<th>15-18 months</th>
<th></th>
<th>24 months</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>%</td>
<td>N</td>
<td>%</td>
<td>N</td>
<td>%</td>
</tr>
<tr>
<td>1 to 5 partners</td>
<td>12</td>
<td>50</td>
<td>6</td>
<td>35</td>
<td>27</td>
<td>30</td>
</tr>
<tr>
<td>6 to 10 partners</td>
<td>11</td>
<td>46</td>
<td>9</td>
<td>53</td>
<td>47</td>
<td>53</td>
</tr>
<tr>
<td>More than 10 partners</td>
<td>1</td>
<td>4</td>
<td>2</td>
<td>12</td>
<td>15</td>
<td>17</td>
</tr>
</tbody>
</table>

Base: All projects working in partnership with at least one other organisation (130)

Of projects working with at least one other organisation, just over half (52 per cent) had between six and ten partners (inclusive). Over a third (35 per cent) had five partners or fewer and 14 per cent had more than ten. Projects based within a local authority or statutory organisation reported a greater number of partners than national or local voluntary projects. On average, local authority and statutory projects were working with six partners, compared with national voluntary projects who reported an average of five and local voluntary projects who reported four. Though the differences between the average numbers or partners was minimal, this variation may be explained by the fact that both local authorities and national organisations have access to and are likely to work with other departments within their organisation and they may report these relationships as partnerships. Partnership activities are perhaps generally more embedded in the fabric of local government as a result of the changes in operation over the last ten years reflected in, for example, Local Strategic Partnerships and Crime and Disorder Reduction Partnerships. Local authorities may also be involved in initiatives such as Joint Teams and Joint Working Partnerships which may expose them to a greater number of partner organisations and relationships.

Just over a fifth (22 per cent) of projects said they did not work in partnership with any other organisations which is perhaps surprising given the name and nature of the Partnership Fund. The evidence suggests that the level and duration of funding projects received from the Partnership Fund is important for explaining differences in the number of partners they reported. Projects funded for one year were unlikely to report a high number of partners – only four per cent reported having relationships with more than ten partners. Those funded for two years were four times more likely than projects funded for one year to report more than ten partners (17 per cent). Evidence from the qualitative work suggests that where projects felt they lacked sufficient resources they had not pursued partnerships as enthusiastically as others at the outset of the project. Project A, funded for one year and based within a local advice service, for example, reported that it had no partners and that this was because it lacked the resources to pursue them when the project was established. That Project J, funded for two years and the local branch of a national advice service, was able to employ a member of staff solely to establish partnerships and consequently reported relationships with a wide range of partners also supports this. This supports the argument (set out in Chapter 3) that funding is a cornerstone of service delivery, the level and duration of which affects the activities of funded projects and arguably the potential outcomes for older people.
Table 7.2  Relationships between projects and other organisations under the Partnership Fund

<table>
<thead>
<tr>
<th>Categories</th>
<th>Had relationship N</th>
<th>%</th>
<th>Relationship was new N</th>
<th>%</th>
<th>Relationship existed N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pension Service</td>
<td>95</td>
<td>73</td>
<td>33</td>
<td>35</td>
<td>62</td>
<td>65</td>
</tr>
<tr>
<td>Social Services</td>
<td>92</td>
<td>71</td>
<td>14</td>
<td>15</td>
<td>78</td>
<td>85</td>
</tr>
<tr>
<td>Housing Benefit/ Council Tax office</td>
<td>84</td>
<td>65</td>
<td>17</td>
<td>20</td>
<td>67</td>
<td>80</td>
</tr>
<tr>
<td>Other local council</td>
<td>76</td>
<td>59</td>
<td>12</td>
<td>16</td>
<td>64</td>
<td>84</td>
</tr>
<tr>
<td>Local church/religious group</td>
<td>60</td>
<td>46</td>
<td>25</td>
<td>42</td>
<td>35</td>
<td>58</td>
</tr>
<tr>
<td>Schools</td>
<td>14</td>
<td>22</td>
<td>5</td>
<td>29</td>
<td>12</td>
<td>71</td>
</tr>
<tr>
<td>Clubs</td>
<td>56</td>
<td>43</td>
<td>22</td>
<td>37</td>
<td>38</td>
<td>63</td>
</tr>
<tr>
<td>Police service</td>
<td>35</td>
<td>27</td>
<td>10</td>
<td>22</td>
<td>26</td>
<td>78</td>
</tr>
<tr>
<td>Fire Service</td>
<td>39</td>
<td>30</td>
<td>12</td>
<td>28</td>
<td>32</td>
<td>71</td>
</tr>
<tr>
<td>Health service/clinic/GP/pharmacy</td>
<td>90</td>
<td>72</td>
<td>23</td>
<td>25</td>
<td>68</td>
<td>75</td>
</tr>
<tr>
<td>Advice service e.g. CAB</td>
<td>92</td>
<td>71</td>
<td>19</td>
<td>22</td>
<td>69</td>
<td>78</td>
</tr>
<tr>
<td>Shop Mobility</td>
<td>24</td>
<td>19</td>
<td>10</td>
<td>42</td>
<td>14</td>
<td>58</td>
</tr>
<tr>
<td>Local voluntary organisation</td>
<td>90</td>
<td>69</td>
<td>13</td>
<td>15</td>
<td>66</td>
<td>85</td>
</tr>
<tr>
<td>Other</td>
<td>22</td>
<td>17</td>
<td>6</td>
<td>38</td>
<td>10</td>
<td>63</td>
</tr>
</tbody>
</table>

Further reasons for these differences in the extent of partnership working for individual projects relate to partners’ motivations for working together, and other contextual factors, and are explored in Sections 7.3 and 7.4.

7.1.2  The types of organisations partnering projects

Projects that reported partnership working mentioned a wide variety of partner organisations. These encompassed:

- **Statutory partners**

Projects’ statutory partners comprised the Pension Service, local authorities, health services, the fire service and the police service. The most commonly reported partners were the Pension Service, just under three quarters (73 per cent) of funded projects with at least one partner said they worked with them. A similar number (72 per cent) worked with health services including GPs, occupational therapists, community psychiatric nurses, clinics and pharmacies. Specific departments within local authorities with whom projects worked were housing (65 per cent), social services (71 per cent), supporting people teams, advice services and affordable warmth units.
• **Voluntary partners**

Funded projects were partnered by a range of voluntary organisations. Seventy-one per cent worked with advice centres like Citizens’ Advice Bureau (CAB) while a similar number (69 per cent) of projects worked in partnership with local voluntary organisations. These encompassed housing associations, community legal services, welfare rights services, local care providers, disability support groups, carer support groups, charities, local minority ethnic support groups and advice services.

It was evident that projects were more likely to have partnerships with certain organisations. Projects based within local authorities or statutory organisations were more likely than other types of projects to report working with other council departments – three-fifths (60 per cent) reported relationships with housing offices and 67 per cent worked with social services and other council departments. This may be explained by the fact that for most projects, ‘partners’ were separate organisations, perhaps based in different premises. However, projects located within larger local or national organisations, for example CABx, and local authorities worked closely with other departments and teams within that organisation. These projects essentially had a ‘ready-made’ set of partners with whom they either had established relationships or with whom it was relatively straightforward to initiate a relationship on the basis that they were in the same building or shared the same operating structures. Other structures such as Joint Teams and Local Strategic Partnerships also impacted upon the number and type of partners that projects had. As discussed previously, these affected the partnership activity of local authorities in particular because of the key role they can play in such initiatives.

Relationships with the Pension Service were most common where projects were based within a national or local voluntary organisation such as Age Concern – three-quarters (75 per cent) of such projects reported working in partnership with the Pension Service. Just over two-thirds of projects based within a local authority (67 per cent) worked with the Pension Service in some way. These findings may be explained by previous relationships between the Pension Service and local services for older people. For example, voluntary organisations used to house Pension Credit ‘surgeries’ run by the PSLS which meant that relationships developed between these organisations. Similarly, Partnership Liaison Managers (PLMs) and staff at local authorities talked generally about a history of these partners working together because of the complementarity of their services.

The Partnership Fund itself had a discernible impact upon the types of organisations with which projects worked in partnership. It is clear that the Fund has initiated better relationships with the PSLS. Just under three quarters (73 per cent) of projects working in partnership reported a relationship with the Pension Service, more than a third of which (35 per cent of the total number of projects working with the Pension Service) had not worked with them before. The focus of the Fund on hard to reach groups, including older people from ethnic and cultural minorities, has also helped to inaugurate certain types of partnerships between community projects. Of those funded projects working with the local church or other religious group (46 per cent), over two fifths of them (42 per cent) had not worked with them before.
Table 7.3  Nature of relationships between projects and other organisations under the Partnership Fund

<table>
<thead>
<tr>
<th>Categories</th>
<th>Joint service delivery</th>
<th></th>
<th>Joint outreach</th>
<th></th>
<th>Referrals</th>
<th></th>
<th>Information sharing and training</th>
<th></th>
<th>Verifies documents</th>
<th></th>
<th>Promotes services</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% of responses</td>
<td>% of cases</td>
<td>N</td>
<td>% of responses</td>
<td>% of cases</td>
<td>N</td>
<td>% of responses</td>
<td>% of cases</td>
<td>N</td>
<td>% of responses</td>
<td>% of cases</td>
<td>N</td>
</tr>
<tr>
<td>Pension Service</td>
<td>27</td>
<td>15</td>
<td>27</td>
<td>26</td>
<td>11</td>
<td>27</td>
<td>72</td>
<td>31</td>
<td>75</td>
<td>46</td>
<td>20</td>
<td>48</td>
</tr>
<tr>
<td>Social Services</td>
<td>6</td>
<td>4</td>
<td>9</td>
<td>16</td>
<td>8</td>
<td>18</td>
<td>90</td>
<td>46</td>
<td>99</td>
<td>36</td>
<td>19</td>
<td>40</td>
</tr>
<tr>
<td>Housing Benefit/ Council Tax office</td>
<td>12</td>
<td>7</td>
<td>16</td>
<td>22</td>
<td>12</td>
<td>28</td>
<td>61</td>
<td>33</td>
<td>78</td>
<td>36</td>
<td>20</td>
<td>46</td>
</tr>
<tr>
<td>Other local council</td>
<td>7</td>
<td>5</td>
<td>10</td>
<td>18</td>
<td>12</td>
<td>26</td>
<td>58</td>
<td>38</td>
<td>83</td>
<td>29</td>
<td>19</td>
<td>41</td>
</tr>
<tr>
<td>Local church/ religious group</td>
<td>4</td>
<td>3</td>
<td>6</td>
<td>16</td>
<td>13</td>
<td>23</td>
<td>47</td>
<td>37</td>
<td>67</td>
<td>16</td>
<td>13</td>
<td>23</td>
</tr>
<tr>
<td>Schools</td>
<td>5</td>
<td>9</td>
<td>18</td>
<td>2</td>
<td>4</td>
<td>7</td>
<td>22</td>
<td>41</td>
<td>79</td>
<td>11</td>
<td>20</td>
<td>39</td>
</tr>
<tr>
<td>Clubs</td>
<td>3</td>
<td>1</td>
<td>5</td>
<td>23</td>
<td>18</td>
<td>37</td>
<td>37</td>
<td>29</td>
<td>60</td>
<td>15</td>
<td>12</td>
<td>24</td>
</tr>
<tr>
<td>Police service</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>13</td>
<td>22</td>
<td>41</td>
<td>17</td>
<td>29</td>
<td>53</td>
<td>6</td>
<td>10</td>
<td>19</td>
</tr>
<tr>
<td>Fire Service</td>
<td>1</td>
<td>4</td>
<td>9</td>
<td>20</td>
<td>29</td>
<td>57</td>
<td>17</td>
<td>25</td>
<td>49</td>
<td>7</td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td>Health service/ clinic/GP/ pharmacy</td>
<td>16</td>
<td>9</td>
<td>21</td>
<td>23</td>
<td>13</td>
<td>29</td>
<td>65</td>
<td>36</td>
<td>82</td>
<td>65</td>
<td>36</td>
<td>82</td>
</tr>
<tr>
<td>Advice service e.g. CAB</td>
<td>16</td>
<td>8</td>
<td>20</td>
<td>32</td>
<td>16</td>
<td>39</td>
<td>66</td>
<td>33</td>
<td>81</td>
<td>33</td>
<td>17</td>
<td>40</td>
</tr>
<tr>
<td>Shop Mobility</td>
<td>3</td>
<td>7</td>
<td>12</td>
<td>7</td>
<td>15</td>
<td>29</td>
<td>12</td>
<td>26</td>
<td>50</td>
<td>8</td>
<td>17</td>
<td>33</td>
</tr>
<tr>
<td>Local voluntary organisation</td>
<td>15</td>
<td>7</td>
<td>16</td>
<td>37</td>
<td>17</td>
<td>41</td>
<td>72</td>
<td>33</td>
<td>80</td>
<td>38</td>
<td>18</td>
<td>42</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>5</td>
<td>12</td>
<td>7</td>
<td>17</td>
<td>44</td>
<td>14</td>
<td>34</td>
<td>88</td>
<td>6</td>
<td>15</td>
<td>38</td>
</tr>
</tbody>
</table>
7.2 Styles of partnership working

There is a wealth of evidence to suggest that the Partnership Fund has encouraged funded projects and their partners to re-evaluate and re-define the way they work together. This is demonstrated in the styles of partnership working employed by projects and partners and is explored in the following section.

Various ways of working in partnership were evident from the relationships described by partners and project staff. These styles were varied and projects were not limited to a single style. Rather, a single relationship between partners could incorporate various styles of working at different points in their working relationship. Moreover, individual projects also employed different styles to suit the relationship desired with their different partners.

There are two aspects of partner relationships that characterise these different styles of working. The first is the extent to which partners were involved in integrated working. Some partnerships required staff from the partner organisation and the project to work closely together. This might be physically, with staff located in the same office, or virtually, characterised by a high level of telephone or email contact between staff. A high level of understanding between partners about the scope and nature of each other’s service also underpinned this level of integration.

The second is the degree to which the partnership was ‘formalised’. Relationships varied in terms of how far their practices were formally established by contract or other forms of written agreement. They also differed in the extent to which the activities of partners required written or verbal consent from customers or the partner organisations themselves, or needed documenting or recording in some way.

The different arrangements for working together that are presented below incorporate different degrees of integration and formality, the reasons for which are also discussed. These styles are summarised in Figure 7.1.

A high level of integration between partner organisations was evident where both undertook aspects of service delivery and where they held joint outreach events.

7.2.1 Joint service delivery

Joint service delivery was characterised by more than one organisation taking responsibility for delivering an element of the funded service. Partners provided either different but complementary services to the same customer group or the same service but to different customer groups. This could mean partners were located in the same office and physically delivered their services side-by-side or that funded projects and their partners operated from different locations. For example, Project C’s four partners each provided a similar benefits advice service to several different minority ethnic customer groups. They each delivered their service from the premises of their parent organisations that were located within the relevant minority ethnic communities which facilitated access to their target
customers. Even though staff effectively delivered the service jointly, they rarely met each other face-to-face although they shared their experiences of customers’ needs and service delivery via telephone and email.

### Table 7.4 Styles of partnership working

<table>
<thead>
<tr>
<th>Categories</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joint service delivery</td>
<td>141</td>
<td>8</td>
</tr>
<tr>
<td>Joint outreach</td>
<td>262</td>
<td>14</td>
</tr>
<tr>
<td>Referrals</td>
<td>633</td>
<td>34</td>
</tr>
<tr>
<td>Information sharing and training</td>
<td>304</td>
<td>16</td>
</tr>
<tr>
<td>Verifies documents</td>
<td>83</td>
<td>4</td>
</tr>
<tr>
<td>Promotes services</td>
<td>431</td>
<td>23</td>
</tr>
</tbody>
</table>

Base: 125 (All projects working in partnership with at least one other organisation); 5 missing cases

Joint delivery was also evident where partners undertook joint customer visits. These enabled staff to share skills and forge shared understandings of customer needs. For example, Project H specialised in providing quality-of-life services to older people with mental health difficulties with whom it could be difficult for staff from unfamiliar organisations to forge relationships. Staff carried out visits to customers in conjunction with community psychiatric nurses. It was hoped this would facilitate relationship building between the customer. Joint delivery arrangements were not commonly reported by funded projects – they accounted for only seven per cent of the reported activity between projects and partners. The exception to this was within relationships between projects and the Pension Service – this is discussed in Section 7.5.

#### 7.2.2 Joint outreach

Outreach events comprised activities such as road shows, presentations and ‘surgeries’ where project and partner staff were on hand to provide customers with information about their services, make appointments and give advice. Sometimes staff were able to deliver their service at the event, for example where the service included a benefits check. Joint outreach activity involved partners setting up and delivering promotional events together. Project G, for example, held road shows with organisations including the local Primary Care Trust and the council’s Affordable Warmth Unit which allowed customers to access several relevant services at the same time. Partners also attended each other’s outreach events, especially if one organisation already held a regular, well-attended event. Projects J and M attended their local council’s open days where older people could obtain their free bus-pass. Staff erected stalls, handed out leaflets about their service and made appointments for home visits. Such activities cut the cost of outreach for projects and facilitated access to projects’ target customers.
Joint outreach activity was reported by projects partnering all kinds of organisations. It was generally less frequent than some other styles of partnership working, in particular referrals and sharing information (these are discussed below), and accounted for 14 per cent of all partnership activity. It was more common in terms of the activities projects reported undertaking in partnership with the police and fire services – of the partnership working projects reported with the police, 22 per cent was joint outreach activity and with the fire service, this figure was 29 per cent. Projects explained that the high profile of these emergency services and the fact that they were likely to be in contact with vulnerable people were good reasons for undertaking joint outreach activities with them.

**Figure 7.1  Summary of styles of partnership working**

<table>
<thead>
<tr>
<th>Joint service delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Responsibility for delivering elements of the project’s service-offer was held by different partners; project staff and partners conducted customer appointments together</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Joint outreach</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Partners established and ran joint outreach events e.g. roadshows, presentations; partners attended each others’ established outreach events</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sharing customer lists</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Information was shared between partners about their customers’ benefit history, contact details and other personal information to facilitate the targeting of services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Referrals</th>
</tr>
</thead>
<tbody>
<tr>
<td>• One-way or reciprocal arrangements between partners whereby customers were referred between services to address different needs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Information sharing and training</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Partners shared information and updates about benefits, their services, learning from delivering services to older people; they also delivered training in benefits and other skills</td>
</tr>
</tbody>
</table>

**7.2.3  Sharing customer lists**

Certain working arrangements required some level of formality in partners’ relationships. This was a particular characteristic of relationships where customers’ details were shared between organisations and, consequently, staff were keen to ensure compliance with the Data Protection Act (DPA). Over a third (37 per cent) of funded projects used customer lists from partner organisations to identify customers for their service. Local authority-held lists, from social services and housing departments, and lists of customers provided by the Pension Service were the most common sources.
It was necessary for certain organisations to share customer contact details and information about customers’ case history, for example a history of benefit receipt or mental health difficulties, in order to assess customers and refer them to appropriate services. This increased project and partner awareness of customer needs and the implications of these needs for how best to deliver services to customers. It also reduced the need for partners to re-collect the same information from customers and allowed staff to take necessary precautions when visiting customers at home.

Where organisations were unable to share customers’ contact details, one partner might distribute promotional material about the other’s services on their behalf. For example, one of Project K’s partners, a care line for older people in sheltered housing, regularly undertook mail-shots for the project thus allowing it access to a core group of target customers but they did not actually pass on customer details to the funded project, thus ensuring compliance with data protection requirements.

Table 7.5  Projects’ use of lists from other organisations to identify customers

<table>
<thead>
<tr>
<th>Categories</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use lists</td>
<td>61</td>
<td>37</td>
</tr>
<tr>
<td>Does not use lists</td>
<td>104</td>
<td>62</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Base: 167

Whilst staff at both funded projects and partner organisations recognised the importance of ensuring compliance with the DPA when exchanging customers’ personal details, they did express a preference for other partnership activities to be less formalised. This was because formal procedures often involved paperwork and form-filling which was resource-intensive and time-consuming and could impact on the speed with which staff could respond to customer requests.

7.2.4 Referrals

Referral of customers between organisations was the most frequently reported style of working, accounting for around a third of all (34 per cent) partnership activities reported by projects.

There were two kinds of referral relationships: one-way, either from projects to partners or from partners to projects; and reciprocal, where projects and partners referred customers to each other. Projects received referrals for customers needing help with claiming benefits and, where they specialised in helping a specific older people group, received referrals for customers with a broader range of support needs. Project H, which aimed to provide benefits advice to older people with mental health difficulties, took referrals from other mental health organisations and the local mental health team for a range of support services, including benefits advice but also befriending, emotional support and social activities.
Projects referred to their partners when their service did not fully meet a customer’s social care needs. Alternatively, referrals happened when a partner had established expertise in a particular type of benefit, or when a benefit claim was particularly complex. Project J undertook benefits claims for its customers but referred to other organisations where customers’ needs fell outside this remit, for example to social services for home support needs or to the local authority for queries regarding council tax. Referrals could ensure that an individual customer accessed the full range of services they needed to meet their needs. Referrals were also effective in re-directing customers who had approached an organisation for a particular service in error, and introducing customers to organisations they might otherwise not have considered or come across.

There were a range of procedures in place to facilitate organisations in making referrals which varied in the degree to which they were formalised. They included completing referral forms detailing a customer’s contact details, history and service needs, to email and telephone conversations between staff at different organisations. Customers’ verbal consent was generally sought before referrals were made. Where projects used referral forms, these sometimes included a space for the customer to give written consent for their details to be shared. Again, whilst staff were keen to comply with data protection regulations, there was a preference for informal email and telephone referrals because these methods tended to mean referrals happened more quickly and therefore that customers were seen more quickly.

Where customers refused consent for a referral or where partners were keen that customers were highly involved in making the decision to access services, partners sign-posted each other’s services. This involved providing customers with information about the nature of a partner’s service offer and their contact details, and encouraging the customer to make contact.

7.2.5 Information sharing and training

The expertise of an organisation, and its staff, in working with older people is another of the foundations of project delivery outlined in Chapter 4. Activities designed to further this were another key way in which partnership relationships were played out. Projects and partners were keen to share information about benefits and services for older people and any learning that they had acquired about the delivery of services or the engagement of customers. Partners gave presentations about their services at each other’s organisations, advised and provided training to partners where they had specific areas of expertise, for example in relation to certain benefits. Staff also attended forums with the aim of updating each other on their respective services for older people. For example, staff at Project F described a series of meetings they attended along with staff from social services, the local council’s housing office, the Pension Service, and the local CAB office that aimed to ensure each service was aware of the services offered by others.
These relationships tended to be informal and arrangements were made on an ad-hoc basis according to the needs of a project or partners’ availability. Some meetings were part of a regular series, for example those that were convened by the Pension Service or by a specific local authority strategy group, and were held more frequently.

7.2.6 The appropriateness of partnership style

Partnerships displaying greater degrees of integration or formality were not necessarily more effective in achieving their objectives and delivering services to customers. Rather, it was the extent to which these arrangements met the needs and purpose of the partnership, and were appropriate for the staff and organisations involved that determined their efficacy. It was clear that some projects were adept both at forging partnership relationships, and at reflecting on and employing different arrangements with different partners to good effect. Project G, a benefits advice service based within a local authority, had numerous partner relationships serving different purposes. For example, the project worked with the Pension Service to provide scans of claimants for Housing Benefit (HB), Council Tax Benefit (CTB) and Pension Credit to each other in order to maximise benefit claims. They worked with other parts of the local authority to make and receive customer referrals, including the Affordable Warmth Unit who provided the project with information about grants awarded in case this affected customers’ eligibility for certain benefits. Project staff also provided training in benefit claims to local organisations delivering services to older people and undertook outreach activities with them to access their customers.

Whilst the variety of arrangements for working together that partners described post-Partnership Fund were not very different from those in place beforehand, there was evidence that the Fund had encouraged partners to think more carefully about how they interacted with other organisations and reflect on the effectiveness of their arrangements. Projects also expressed a different attitude towards working in partnership following funding. Some described a more committed partner relationship than existed prior to the Partnership Fund, perhaps facilitated by the re-negotiation of partner contributions to the relationship at the outset of the project. Whilst this did not necessarily manifest itself in new arrangements for working together, it may have meant that particular styles of partnership working were more effective under the Partnership Fund than they might otherwise have been.

7.3 Motivations for partnership working

As explored above, projects partnered numerous and different kinds of organisations, and worked with them in different ways. A number of factors relating to projects’ and partners’ motivations for working together explain these differences. This is explored in the section that follows.
Projects generally chose partners delivering services that would complement their own with a view to **maximising customer access to services**. This could be achieved by making referrals to their partners thereby meeting a wider range of their customers’ needs. This was particularly the case for smaller projects and partners with very specific disability or minority ethnic customer groups. Project D, for example, was a relatively small project dealing specifically with older people with drug and alcohol dependency and mental health difficulties. Staff at this project had developed a long list of partners to whom they could refer their customers enabling them to meet the broad range of needs their customers presented within the confines of their limited resources.

Another motivation for forging partnerships was for partners and projects to **gain access to more of their target customers**. Staff pursued referral relationships with other organisations on the basis that they would be in contact with customers who might also benefit from their service. For example, Project K, a benefits advice service based within a local authority, established a referral relationship with a partner providing older people with home alarms. The project thought that this partner’s customers could potentially experience financial difficulties and may therefore be eligible for certain benefits. Similarly, Project G partnered the Affordable Warmth Unit at the local council on the basis that customers who struggle to pay their fuel costs might be eligible for extra benefits. Projects also targeted partners working with carers who they felt were unlikely to think of themselves as eligible for benefits and therefore might be in need of them, and also because carers themselves could provide access to another group of older people. These partnerships tended to be referral and sign-posting relationships though some led to partners sharing their customer lists with each other.

Referral relationships were used in this way to allow funded projects and their partners to **focus on their ‘core’ service**, enabling organisations to see a greater number of their target customers. Project J’s staff referred customers to the local authority housing office for housing-related queries or to a local legal advice service in order that they could focus their efforts on providing advice and assistance with benefit claims. Project B’s home care support partner found completing benefit claim forms too time consuming and referred customers to the project for assistance with this. This allowed the partner to focus on its remit to provide broader quality-of-life services to its customers.

Projects and their partners were also keen to work together to **ensure that their services did not overlap**. Staff consistently talked about the fear that projects and partners would ‘tread on each other’s toes’. This was particularly true for projects and partners that provided services to older people generally and did not focus on a specific group or type of older person. This encouraged partners to form relationships with each other to learn about the nature and scope of each other’s services. In turn, partners were able to make informed referrals to each other, ensuring that all partner organisations were working efficiently and that customers’ full range of needs were being met.
The hope that working with another organisation might improve their image was at the root of some project’s involvement in partnership working. This was particularly true of projects and partners within local authorities who felt that working with local voluntary organisations made their service appear more accessible. The manager of Project M, a benefits advice service based within a local authority advice team, established a relationship with the local CAB which later housed the project worker and administrative assistant. The CAB office was in the centre of the town and therefore more practically accessible for customers. The project manager also felt the CAB ‘badge’, in comparison with that of the bureaucratic local authority, contributed to its appeal to customers. Conversely, smaller projects and partners felt that working with larger, well-known organisations, including local authorities and the Pension Service, would lend them credibility and therefore benefit their image. Such partnerships did not necessarily require partners to deliver their service together or to make referrals between them. Rather, what was key was that organisations were able to deliver their service from each other’s premises or use each other’s names on their promotional materials.

Finally, the Partnership Fund itself was the catalyst for the development of certain partnerships. Staff from some projects cited that the requirement for partnership activity within the funding guidelines made them seek out specific kinds of partners. For example, the manager of Project E, a carer support project, was responsible for putting together the Partnership Fund bid. He described establishing a relationship with the local branch of a national advice service for older people and an advice service specialising in providing services to customers with disabilities, specifically to meet the specific requirements of the Fund. Whilst he acknowledged that it began as a ‘partnership of convenience’, the relationship had developed and the partners were sharing resources such as office space and making effective use of referrals between them. Projects and partners were generally acutely aware of the importance of maximising resources and in some cases the goal of partnerships was to share any resources from successful funding applications between organisations in need.

7.4 Factors facilitating effective partnership working

The effectiveness of partnership working was underpinned by several factors. The appropriateness of the style of partnership working adopted, as outlined above in Section 7.2 is undoubtedly one. There were, however, four additional influences:

- the clarity and synchronicity of partners’ motivations for working together

The preceding discussion of motivation for partnership suggests that all projects and partners expressed clear motivations for establishing their partner relationships however it was not the case that all had been purposefully pursued. Some were in existence prior to receiving funding from the Partnership Fund and were simply extended or maintained by funded projects. Others developed quite
by chance when a member of staff joined a project from another organisation and brought with them contacts from that organisation which then became a partner. Where partnership lacked well thought out motives which were shared by all parties, the evidence suggests they were less successful. This is not to say that partnerships that lacked complete clarity of purpose were never useful. Indeed, the very fact that such relationships were often long-established meant that organisations had developed a good understanding of each other's preferences for working together. This made it easier and less resource-intensive to sustain effective partner relationships.

- **partners’ understanding of each other’s services**

The extent to which projects and partners understood the scope of their respective services was key to ensuring effective partnerships. Appropriate referrals and sign-posting, the provision of complementary rather than duplicitous services and effective joint delivery were all underpinned by this knowledge. Where project staff had previously worked for a partner organisation, or had brought to the project partner contacts with whom they had previously worked, this facilitated better understanding of different organisations. Such understanding between partners meant that a customer’s full set of needs could be met by a range of service providers.

- **the local context of partnership activity**

There was evidence to suggest that partnerships were easier to establish and sustain for projects operating in smaller, rural areas, or where fewer similar organisations existed. This was because there were fewer organisations with which to become familiar and fewer partnerships to maintain and therefore doing so was less resource-intensive. Conversely, where a range of organisations were seen to be competing for the same group of older people in one area, partners could see each other as a ‘threat’. They feared that competition would make identifying their customers more difficult and expensive, and that future funding would be harder to secure if too many organisations were able to demonstrate that they were providing a service to the same target customers. This was particularly the case in urban areas where there was a greater concentration of services for older people. Project G, based within an urban local authority, found forging a relationship with the local branch of a national voluntary advice service difficult because of their fear that it, with its higher profile and greater resources, could win the attention of their customers. In such circumstances, partnership working was more strained.

- **the profile of partner organisations**

The profile of some organisations apparently hindered their relationships with partners. Whilst projects based within local authorities cited some benefits associated with their profile, such as their familiarity within local communities, some felt the perceived bureaucracy of statutory authorities meant organisations were reluctant to work with them. Other projects felt their profile facilitated
relationships. Project J for example, the local branch of a national advice organisation for older people, felt its national presence and professional reputation encouraged other organisations to work in partnership with it. This did not in itself guarantee an effective relationship but provided partners with a clear motivation to work together, which, as described above, was important for ensuring partnerships remained effective.

This chapter has so far demonstrated that there were numerous and varied manifestations of partnerships and partner relationships between Partnership Fund projects and other organisations in the local area. It has mapped and explored the reasons for this variation and suggested the ways in which this may have impacted upon the effectiveness of partnership working. The next section deals with partnership working between projects and the Local Service.

7.5 Joint working with the Pension Service Local Service

As discussed at the beginning of this chapter, the Pension Service was the partner most commonly reported by Partnership Fund projects that worked with other organisations. These partnership relationships shared some of the same characteristics as those between funded projects and other types of partner organisations and, likewise, a variety of arrangements existed for working together. There were, however, some differences in the way projects and the Pension Service worked together, the reasons for which are explored in the section that follows. As well as interviews with staff, this discussion draws on the perspectives of PLMs and their approach to partnership working under the Partnership Fund.

7.5.1 Styles of joint working

Projects’ arrangements for working with the Pension Service included the variety outlined in Section 7.2 for other types of partners. However, they also described joint working arrangements under a number of other LinkAge initiatives: specifically Joint Teams and Alternative Offices. This section maps these ways of working together, highlighting how they differed from arrangements with other partners, and the reasons for this.

As with other partner organisations, funded projects were more likely to have a referral relationship with the Pension Service than any other kind of relationship. Three-quarters (75 per cent) of those that had a relationship with the Pension Service reported that referrals were made between the project and the Pension Service. By comparison, the next most frequently reported relationship with the Pension Service was an information sharing and training relationship. Just under half (48 per cent) of projects reported this as a type of partnership activity. Referrals, again, were either reciprocal or one-way although there were some differences in the way these were carried out. A greater degree of formality was evident because it was preferred by local service staff and to ensure compliance with data protection policies. PLMs, for example, stated a preference for receiving referrals using referral forms because it ensured they had all the details they needed to be
able to pursue a referral and to enter a customer’s details on their system. They also encouraged the use of mandates where project staff wished to access details about customers’ benefit history.

Whilst capable of undertaking a range of benefit claims on behalf of customers themselves, funded projects did make referrals to the Pension Service. Projects’ reasons for referring to the Pension Service were different from those for referring to their other partners. Customers were referred to the Pension Service for Pension Credit claims where the customer required a home visit and the project was smaller, with fewer resources to do home visits. They were also referred to the Pension Service where a claim for Pension Credit was particularly complex, for example where there had been a bereavement, or where verification would be needed and the project did not have Alternative Office status. Projects that were more holistic in nature, for example Project C which delivered a range of services to elders in different Black and Minority Ethnic (BME) communities, referred all claims for Pension Credit, Attendance Allowance (AA) and Disability Living Allowance (DLA) to the Pension Service. This allowed it to focus its resources on sign-posting customers to a very broad range of quality-of-life services.

Where projects had developed an expertise in specific types of benefits, they appeared to have divided responsibility for different types of benefit claims between themselves and the Pension Service. Project B for example referred all Pension Credit claims to the Pension Service and the Pension Service referred to them customers for AA and DLA claims. This was advantageous for both partners in that it allowed the Pension Service to reduce the number of home visits it undertook whilst meeting targets for Pension Credit claims, and supported the project in developing expertise in disability benefits. In some instances it appeared these arrangements were a hangover from when the Pension Service ran ‘surgeries’ for Pension Credit on the premises of local services for older people and had specific targets for helping customers to claim Pension Credit.

Even though projects were more likely to have some kind of relationship with the Pension Service since the Partnership Fund, the emphasis on various kinds of arrangements was different. Referral relationships appeared less important for funded projects in the case study areas because they often had their own benefits expert and staff reported that they therefore needed to refer to the Pension Service less than they had before the Partnership Fund.

**Information sharing and training** was another arrangement for working together that appeared to be as important between funded projects and the Pension Service as it was for other partner organisations. Almost half of projects (48 per cent) who reported a relationship with the Pension Service said they worked with them in this way. However, project staff and PLMs reported a different emphasis in these arrangements compared with that found between funded projects and other kinds of partners. Where projects and the Pension Service shared information, this tended to be from the Pension Service to the project. For example, PLMs sat on the advisory board for a project or convened meetings such as Local Forums with a range of organisations, including the Partnership Fund project, in order to disseminate information about changes to benefits. It was also
generally the Pension Service that provided training to projects about particular types of benefits claims rather than the other way around although there were exceptions to this where projects had shared their expertise in a specific subject. For example, Project G, based within a local authority, had provided staff at the local service with training about HB and rent allowance, and the local service had trained project staff in making Pension Credit and AA claims. PLMs were concerned that the local service had not been sufficiently involved in delivering training in key benefits such as Pension Credit, AA and DLA to project staff. They felt that some project staff were not equipped to deal with the complexity of some claims and cited instances where claims had ‘gone wrong’ as a result of this lack of expertise.

Although referral and information-sharing relationships were as common between funded projects and the Pension Service as they were with other local and national voluntary organisations, the frequency of other types of arrangements differed. Projects were more likely to report that the Pension Service verified documents for them than other partners did. Twenty-nine per cent of projects working with at least one other organisation reported working with the Pension Service in this way. This is unsurprising since this is one way in which the remit of the Pension Service differs from other organisations, although it is possible that some partners had Alternative Office status and could therefore also perform this role. They were also more likely to report that the Pension Service assisted in the delivery of the project’s services (27 per cent of projects reported this as a way of joint working). This may reflect the strong referral relationships projects reported with them, specifically that projects referred a significant proportion of their customers with benefits applications to the local service. Projects were generally less likely to report that the Pension Service promoted their services on their behalf than other partners – less than a quarter of projects working in partnership with at least one other organisation reported working with the Pension Service in this way – the lowest across all partners. For all other types of partner organisation, at least a third of projects reported that their partner promoted their services. Both project staff and PLMs noted that older people could perceive the Pension Service as unapproachable and therefore staff may not have felt it was useful to associate their project with the Pension Service.

As described in Section 5.1.1, projects using lists of older people from other organisations to target customers also reported this arrangement with the Pension Service. Project G, based within a local authority, and the local service worked closely together to share their customer lists: the project provided information about HB and CTB recipients who might be eligible for guaranteed Pension Credit; the local service provided information about customers in receipt of Pension Credit but not HB or CTB. In this way, both the project and the local service were able to make targeted approaches to those customers most likely to be eligible for additional help. As useful as this arrangement was, it was not however consistently reported by funded projects or PLMs and was evident only where the funded project was housed within a local authority. Indeed, some PLMs were of the belief that they were forbidden from embarking upon such information-sharing agreements with other organisations. This inconsistent picture highlights a lack of clarity amongst
the PLMs interviewed about the appropriateness of certain partnership activities for the PSLS. This is discussed further in Section 7.5.2.

Two further ways of working together were apparent between projects and the Pension Service that were not a feature of the way funded projects worked with other partners. These were functions of other LinkAge initiatives.

**Joint Teams** (JT) were in operation in two case study areas and close to being established in three others. Typically, staff from the Partnership Fund project or its parent organisation were involved. PLMs were overwhelmingly positive about the impact of Joint Teams on the provision of service to older people and on partner networks. Operationally, JTs were seen as ‘the first step towards a third-age service’ with relevant organisations working together and sharing information to provide a holistic service for older people. Key to this was the co-location of partners and the way it facilitated sharing information about customers.

Difficulties establishing JTs in some areas had frustrated both PLMs and project staff who recognised the ways in which they could facilitate partnership working. In particular, there was confusion about whether or not local authorities could be involved in JTs where they had received Partnership Fund resources and this had delayed their set up. Local authorities were also reported to be unhappy with a joint management structure which had again delayed setting up JTs. The newly formed Joint Working Partnerships had helped by allowing partners to retain some individuality in their working practices.

A number of projects had gained Alternative Office (AO) status during the time they were being funded by the Partnership Fund. This allowed non-Pension Service organisations to verify customer documents for benefit applications without the need to send them to a Pension Centre. PLMs identified that this arrangement had reduced their workload and was facilitating a quicker service for customers who no longer needed to send documents off for verification. It also provided another incentive for funded projects and the PSLS to stay in touch which facilitated a closer relationship between them, and for other projects to forge relationships with local services who held AO status. PLMs were keen to extend the number of AOs in their areas however were encountering difficulties where projects did not hold the requisite quality mark or where they were deemed ineligible because their organisation performed some sort of lobbying function. These difficulties had deterred some projects from pursuing AO status and again may highlight a potential area of missed opportunity for partnership working between the local service and Partnership Fund projects.

**7.5.2 Factors underpinning relationships between funded projects and the PSLS**

These different arrangements between projects and the PSLS demonstrate different levels of intensity within such relationships. It is clear that some projects reported highly co-operative and communicative relationships with the PSLS and demonstrated considerable evidence of partnership working between themselves.
Others had little or no contact with the local service at all. A number of factors are key in understanding the reasons why working arrangements between funded projects and the PSLS differed so considerably. These encompass:

- **the historical relationship between the Pension Service and funded projects**

  The Pension Service had previously worked with the parent organisations of some funded projects and this meant that relationships were easier to establish and develop under the Partnership Fund. There had been joint activities in the past such as where the Pension Service had run Pension Credit ‘information points’ at organisations’ premises some years previously. PLMs did however acknowledge that some aspects of these past relationships with organisations made establishing partnerships more challenging. For example, whilst the information points for Pension Credit had helped to establish relationships with some partners, the subsequent withdrawal of collaborative services like these following an apparent change in approach by the PSLS, had damaged it with others. PLMs expressed concerns that some partners were more reluctant now to engage with the Pension Service in case a similar shift away from joint working and cooperation happened again in the future. Furthermore, initiatives like the Partnership Fund represent a relatively new emphasis on joint working between services for older people. As well as the difficult relationships between some organisations that have worked together previously, the different cultures and structures of organisations that are beginning to work together pose challenges for the development of effective working relationships. These challenges are manifest in other factors that explain why the working arrangements between funded projects and the PSLS differed that are described below.

- **the recruitment of PSLS staff by the Partnership Fund project**

  A factor that undoubtedly had a positive effect on the relationship between the funded projects and the PSLS was the recruitment of former Pension Service staff to work at the funded project. Where this occurred, the workers brought with them to the project not only established relationships with Pension Service staff but also an understanding of how the Pension Service works and a very high level of knowledge and understanding of the benefits system. The presence of a former employee at the funded projects also appeared to inspire confidence amongst PLMs and PSLS staff in the competence of the project to deal with complex benefit applications.

---

6 It is worth noting that the data regarding relationships between PLMs and Partnership Fund projects were collected as part of the qualitative case studies. These factors therefore illustrate the range and type of views held by PLMs. However, this data cannot support any inference about the relative prevalence of these views.
• the degree of trust projects had in the motivation of the PSLS
Project staff were sometimes dubious about ‘what side the Pension Service are on’ when processing benefit applications. In question here was the commitment of the Pension Service to benefit maximisation for older people. Those that did not work closely with the PSLS perceived them as less inclined than projects to make successful claims and there was evidence of some reluctance to refer customers’ claims to them because of this. This initially impacted upon whether or not projects and the local service would work together and then the character of their relationship where they did.

• PLMs’ understanding of their role within the Partnership Fund
From the Fund’s inception, some PLMs expressed a lack of certainty about the parameters of their role. For example, there was little consistency across PLMs as to how they perceived their role in the application process. Some were quite clear that they should have had no involvement whatsoever and recalled specific instruction from their managers to this effect. Conversely, there was a lack of clarity amongst others about what their role should have been during this time. Such inconsistent interpretations led to very different approaches being taken by different PLMs and correspondingly different levels of support being given to potential Partnership Fund projects. In one case, a PLM had written a letter to accompany an organisation’s bid pledging the support of the PSLS, whereas other PLMs were clear there should have been no contact or intervention by them in the application process.

This sort of confusion manifested in other aspects of the PSLS relationship with projects once Partnership Fund projects were up and running. PLMs gave mixed reports about the nature and extent of information about the work that they expected to receive from both funded projects and from the Pension Service itself. Across the PLMs interviewed, there were different accounts of how they worked with projects. Even within a single district, the same PLM described vastly different levels of co-operation with funded projects such that some projects clearly received more support and attention than others.

This undoubtedly reflects upon the guidance given to PLMs about their role. There was a general view that the steer given by senior management about relationships with funded projects was unclear, leaving PLMs unsure about how much to intervene in activities and how best to support projects to achieve their objectives. Some were clearly wary of working too closely with projects for fear of being perceived to have favourite organisations and spoiling relationships with other non-Partnership Fund partners. Some even expressed a concern that by working with projects, they were effectively granting them ‘double-funding’. This reticence to get involved was not only related to a lack of guidance. There was also a view that it was difficult to achieve the right balance between offering sufficient support to projects and appearing to be ‘checking up’ on their progress.
PLMs felt that their own sense of confusion around the administration of the Partnership Fund generally and also their role within it had made forging effective relationships with funded projects more challenging and impacted upon the nature of their working partnerships for the duration of the Fund. They also felt that their lack of knowledge about the Partnership Fund at its outset, in terms of their role in the application process and about which projects were eventually funded, gave a bad impression of the PSLS and further damaged the establishment and development of partner relationships.

• the way funded projects understood the role of the local service in supporting their activities

The lack of clarity amongst PLMs had clear effects on the way funded projects understood the role of the PSLS from the outset of the Fund. This undoubtedly impacted upon the nature and intensity of the relationships they eventually forged. Indeed, there was some evidence from interviews with project staff of inconsistent understanding about the role of the local service and the ways in which it could assist projects’ work under the Partnership Fund. While some case study projects had a very clear understanding of how the PSLS could help them – for example in training around benefits, in talking through or resolving complex benefit applications and, where customer mandates had been gained, in giving advice on the specific details of a customer’s benefit profile, others appeared unaware of these possibilities. Better knowledge and understanding amongst funded projects was brought about by clear communication and proactive intervention by the PLM, by joint working with other PSLS staff and by the recruitment of former PSLS staff within the funded projects.

• whether funded projects and the PSLS saw each other as a partner or a competitor

Finally, there was a lack of consistency across case study areas in how the relationship between funded projects and the PSLS was portrayed. In some areas, the relationship was seen to be co-operative and mutually beneficial. Indeed, the evidence presented in Section 7.5.1 illustrates the nature of such collaborative working between some projects and the PSLS and the effect it had on what both organisations could achieve. However, in others, there were more cynical interpretations of the Partnership Fund and this undoubtedly affected the quality and intensity of relationships. In these circumstances, Partnership Fund projects were portrayed by PLMs as competitors in the drive to increase benefit take up amongst older people and were seen to be ‘pinching’ the work making it more difficult to reach PSLS targets. Underlying this was a fear that increased involvement of the third sector in the work of the PSLS could have implications for its staffing levels. Such cynicism was also evident amongst some funded projects where workers expressed concerns that by establishing partner relationships with them, the local service were attempting to take work away from them and that they could ultimately lose funding as a result. These perceptions were likely underpinned by the lack of clarity between projects and the PSLS described above about how best to work together and support each
other to achieve their common goal. Again it seems clear that these different perceptions of motivation have influenced the way in which funded projects and the PSLS approached relationships with each other resulting in less co-operative and therefore less effective partnerships, or, in some cases, a lack of partnership working altogether.

We have seen in this, and in the previous two chapters, that the Partnership Fund has given rise to a range of different activities or processes that aim to improve the service offered to older people. We now turn to the next, and final, section of this report which aims to understand the impact of the Partnership Fund, and to draw some conclusions about the work undertaken.
Section C
Impact and conclusions
Impact of the Partnership Fund on older people

The ultimate aim of the Partnership Fund is to improve the lives of older people by increasing the uptake of benefits and by widening access to essential support services. It is this issue that this penultimate chapter is concerned with.

It is worth noting that the evidence presented here is wholly qualitative in nature. Therefore, the aim is to explore the diversity, range and complexity of impacts for customers and not their prevalence. The survey work was conducted with project representatives only. Any quantitative estimate of the impact of project activity on customers was beyond the scope of this evaluation. Such an investigation will be the subject of a separate investigation by Department for Work and Pensions (DWP) operational researchers who plan to examine administrative data returned by the projects to provide some quantitative information on outcomes from the initiatives.

Customers experienced a range of positive impacts from contact with funded projects. These outcomes can be divided into primary and secondary impacts. Primary impacts relate to the immediate impact of taking-up of benefits and accessing services. Secondary impacts relate to the effect these primary impacts had on other aspects of customers’ lives including health, social networks, housing, levels of independence, and emotional and psychological wellbeing. A map of these primary and secondary impacts is set out in Figure 8.1 and both are explored in detail in the sections that follow. The chapter begins by considering some important issues that concern the assessment of customer impact.

8.1 The difficulty of assessing customer impact

Before we explore the range of impacts described by the older people interviewed there are a number of important challenges to doing this that must be articulated. These concern:

- The ability to disentangle the effects of the Fund from the effects of the parent organisation

Irrespective of whether the funded project constituted a new service or an extension of an existing arrangement it was difficult at times to disentangle
outcomes that were attributable to Partnership Fund activity solely and outcomes that might result from usual contact older people had with the parent organisation. For, example, Project D used the Partnership Fund to increase the hours of an existing Benefits and Welfare Advisor from part-time to full-time. Although this project had provided similar support to its customers prior to the Partnership Fund, with the extra funding it was now able to provide a more comprehensive service, develop relationships with other organisations and support more people. The outcomes of this increased capacity were real and valued by staff and customers, but any attempt to separate the outcomes that resulted from the Partnership Fund from those resulting from the parent organisations existing resources is difficult. Outcomes discussed here are therefore likely to be a combination of both the Partnership Fund’s impact and the parent organisation’s own resources and this should be borne in mind as these outcomes are discussed in more detail in the later sections of this chapter.

• **The clarity of customer recall**

There were undoubtedly differences in the degree of clarity customers had about their experience of the service and, consequently, of the outcomes achieved. While some customers had a very lucid recollection of the services provided by the Partnership Fund and were able to talk at length and in detail about their experiences, other customers that were interviewed were frail or of poor physical and mental health. In these cases, recall was not always comprehensive and energy levels or cognitive abilities meant that they were less able to articulate their experiences. This was particularly challenging where customers were receiving support from multiple sources when it was sometimes difficult for them to differentiate between them. Flexible and sensitive interviewing did mitigate some of these effects, but it remains likely that these issues had some impact on the depth it was possible to reach in some interviews and therefore the picture of impact achieved for some customers maybe somewhat incomplete.

• **The overwhelmingly positive nature of customer accounts**

The outcomes described by customers interviewed as part of the case studies were almost wholly positive. While it is not the role of a qualitative study to estimate or even indicate the prevalence of views, the overwhelmingly positive nature of older people’s accounts does deserve mention. This is not to detract from the very real and beneficial role the Partnership Fund projects played in the older people’s lives and this is detailed in full later in this chapter. However, it was rare for customers to criticise or express dissatisfaction with any aspect of the services they received from projects, despite being offered opportunities within the interviews to offer constructive feedback. This is illustrated in the following extract from an interview with one customer:

\[ I: \ldots \text{you’re receiving the help now, is there anything you would change about that system or the contact you’ve had with them…} \]

\[ F: \text{No.} \]
I: …or is there anything that could be done differently would be more helpful?

F: No.

I: Nothing.

F: No complaints whatsoever.

I: Right, no complaints at all.

F: No.

(Project C, female, age 63)

This was true even when, from an outside observer’s viewpoint, the overall benefit gained could be perceived to be moderate or low. It also occurred where there was evidence of unmet need. For example, in the case of the customer quoted above, the financial impact of help from the project had been minimal because the extra money received in benefit had been offset by a reduction in others she received.

There are two possible explanations for older people’s emphasis on the positive. The first is methodological in nature. The approach to sampling customers meant that projects played a role in selection. As a result there was potential for customers with the most positive experiences to be ‘cherry picked’ by staff. Moreover, customers themselves were required to opt-in to the research, and so there is a risk that the more positive customers opted-in (for further discussion of the recruitment process, see Appendix E. This may mean that there are some negative outcomes of the programme out there which were not captured by the evaluation.

The second explanation relates to the expectations that older people have about public services. As discussed in Chapter 6, customer expectations of the services offered were generally low. In this context, therefore, even moderately positive outcomes were viewed with surprise and satisfaction. There is also evidence to suggest that customers perceived help from Partnership Fund projects located in voluntary, community and charitable organisations as a charitable act rather than as a statutory service they had a right to make demands of. In this respect, it is possible that they did not feel in a position to criticise, and were grateful for any help received. Customers described project workers being ‘very good’ to help them, or expressed concerns that they were ‘putting on’ a project worker, suggesting that help from projects was indeed perceived as charity by some.

Notwithstanding these issues, there was recurrent evidence of positive outcomes from contact with projects. These outcomes are discussed ahead.

8.2 Primary impacts

Primary impacts took the form of increased take-up of benefits and increased access to services. These impacts are explored here.
8.2.1 Take-up of benefits

Increasing take-up of benefits was one of the key aims of the Partnership Fund. Ninety-four per cent of projects described this as one of their aims. The range of benefits customers received help and support applying for varied from project to project. They included Pension Credit, Attendance Allowance (AA), Carers Allowance (CA), Disability Living Allowance (DLA), Housing Benefit and Council Tax Benefit (HB/CTB). Successful applications for these benefits had a range of immediate impacts on customers. These included increased awareness of benefits eligibility, income maximisation, and reductions in debt.

Figure 8.1 Impacts of the Partnership Fund

As discussed in Chapter 2, a lack of awareness of the benefits available, and the mistaken perception that they were ineligible were key barriers to take-up. Increasing awareness of benefits eligibility was therefore a key aim for projects if
they were to be successful in increasing take-up. Just under ninety-three per cent of projects aimed to increase awareness of benefits eligibility. Evidence from the interviews with customers suggests that some projects were very successful in doing this. Customers spoke appreciatively of project workers explaining eligibility criteria clearly and comprehensively and, in these cases, customers were able to speak confidently about the type of benefits they received and the reasons for their eligibility:

‘...because we’re on Pension Credit we’re on full Housing Benefit so we get our rent paid and we’re also on Council Tax Benefit. We get that paid. We didn’t realise we had any of these rights really it’s only through Kay [project worker] that we found out’

(Project K, customers, couple, aged 64 and 59)

It is also true however, that increased benefits awareness was not a consistent outcome for all. In some cases, customers received help applying for benefits, but remained confused or unclear about what these were. Customers that were particularly frail, or those with literacy and language barriers were more likely to fall into this category, suggesting that these barriers are a particular challenge when trying to raise awareness of benefits eligibility. Clearly, the main benefit of the Partnership Fund was that it helped these older people to navigate what can be to some a complex benefit system and it may seem irrelevant that they did not absorb the intricacies of the system as long as their primary need (for financial help) was met. Nevertheless, it does raise a question about whether projects can equip some older people with the understanding, awareness and knowledge needed to engage successfully with the benefits system themselves or whether there will always be some need for the kind of guidance and support delivered by funded projects.

Income maximisation was another key outcome of support from Partnership Fund projects. Projects achieved this by targeting customers who were eligible for additional benefits. For example, customers with health conditions were identified as eligible for AA, and where health conditions had deteriorated, customers already in receipt of lower rate AA were helped to make successful applications for the higher rate. In other situations, customers who had been living off savings and small private pensions were identified as eligible for Pension Credit and helped to apply which in turn led to further successful applications for HB/CTB. For customers who had been struggling financially before they received help from Partnership Fund projects, these impacts were particularly intense. The extra income increased their financial stability, sometimes doubling their weekly income. The following case study illustrates how projects increased take-up of benefits and helped maximise income:
Ellen is 86 and has lived alone since her husband died several years ago. Since then she has been living on her state pension, a small pension from her husband’s employment and a small amount of savings. At the same time, she has been paying full rent on her bungalow and full council tax. On her limited income she was struggling to pay her utility bills, and she was putting 20p’s aside to go towards her council tax bill. After going along to a Partnership Fund project road-show, she was identified as eligible for Pension Credit, full HB and full CTB and is now in receipt of all of these. Without the help she received from the project, Ellen would have continued to live off her savings until they had dwindled to nothing.

This positive effect on income had also led to a corresponding reduction in debt for some customers. This manifested itself in a variety of ways. A successful application for HB could help clear rent arrears, ending the threat of court action. Successful applications for benefit enabled a customer to pay out right for household goods, instead of relying on expensive hire purchase arrangements. The impact of increased benefits on debt reduction is illustrated in the following case study:

George and Esther are in their 70s and have been married for over forty years. Esther has arthritis that affects her mobility and George also has a mobility impairment which means he can only walk for short distances. At one stage George was in receipt of AA but this was withdrawn, and, although George and Esther appealed, they were unsuccessful. It was only when they received support from a Partnership Fund project that their appeal was finally successful. They are both now in receipt of AA and Esther receives Pension Credit. The extra money has made a huge difference to their lives. They used to have a credit card that charged a lot of interest but they have now been able to pay this off. They have also cleared a bank loan. For the first time in ages they feel financially comfortable. Without the help of the Partnership Fund project they would not have pursued the appeal, and would still be struggling financially.

Increased awareness of benefits eligibility, income maximisation and debt reduction were the key primary impacts of increased take-up of benefits. Combined, these impacts increased financial security, laying the foundation for further secondary impacts. These are discussed later in this chapter.

8.2.2 Access to services

Alongside increased take-up of benefits, improving access to services was identified by eighty-three per cent of projects as a key aim for them. It is possible to identify four ways in which projects increased access to services. Firstly, by the Partnership Fund project providing services directly; secondly, by linking customers with services offered by the parent organisation; thirdly, by making referrals to partner organisations; and fourthly, by sign-posting customers to other organisations.
The types of services offered by projects varied depending on the needs of the customer and the scope of the project. To help customers maintain their independence in their own homes, referrals were made to Social Services for home adaptations and mobility aids. For customers, these referrals led to a number of direct impacts, including the installation of hand rails on stairs, bath seats, raised seating, aids to facilitate access to gardens, and the installation of bathrooms on the ground floor. It was not uncommon for customers to describe being unaware of the services available to them, and where this was the case, support in accessing this help was particularly valued.

In addition to referrals to Social Services, projects also facilitated access to a ‘handyman’ or a repair service, or supported customers by liaising with Councils about issues related to repairs and home maintenance, referred customers for help with central heating, and helped customers apply for housing. Home safety was another key area in which projects offered help. Where partnerships had been built with the Fire Service, customers had smoke alarms installed. Similarly, partnerships with organisations specialising in care support, meant that vulnerable customers had care alarms fitted in their homes.

The services described so far relate to practical help and support. A range of other services offered by projects, relate to emotional support, social networks, caring responsibilities and leisure activities. Customers with caring responsibilities spoke eloquently about the importance of services that offered them emotional support and respite from their caring role. Cathy for example, who was under a lot of strain caring for her depressed husband, was referred to a support group for carers. Meeting people in a similar situation to herself made her realise she was not alone and helped her cope with the situation.

Customers also described how projects gave them opportunities to socialise and provided access to leisure activities. A project based within a community centre aimed at a Black and Minority Ethnic (BME) community was able to link its Partnership Fund customers to a range of social activities offered by the parent organisation. Where language barriers limited opportunities for older people to develop social networks and access services, these impacts were particularly valued. Mai, a recently widowed customer who could not speak English was helped with benefit applications, and linked to services within the parent organisation through which she was able to develop friendships.

Where services were provided by projects aimed at a particular group of customers, these services were often tailored to meet the needs of their specific target group. For example, Project H which specialised in providing services for elderly people with mental health difficulties, provided an outreach support services that focused on life skills and improving levels of independence. Project L which targeted customers who a specific sensory impairment is another example of a project which tailored its support to meet the specific needs of its customers. In addition to benefits advice, the project was able to link customers to services offered by the parent organisation such as classes aimed at developing communication skills
and assistance in obtaining home aids. This tailored access to appropriate services was highly valued by customers.

8.3 Secondary impacts

The primary impacts of increased take-up of benefits and increased access to services, led to a range of secondary impacts that relate to a variety of different aspects of older people’s lives. These included health, housing, social networks, independence, and emotional and psychological wellbeing. This section looks more closely at these impacts and for clarity will explore each area in turn, illustrating how increased take-up of benefits and greater access to services had an impact. It is worth noting that although they are delineated here the outcomes for customers were complex, and customers (and staff) consistently described a range of impacts across a number of overlapping and interweaving aspects of their lives.

**Health**

Increased take-up of benefits impacted on customers health in a number of ways. With extra financial resources customers were able to afford to pay carers, buy equipment to help with their illness, and pay for therapies that helped their condition. Being able to put the heating on more often without worrying about the cost was also important and for those with mobility problems or limited access to transport, the ability to pay for taxis for trips to the hospital or GP had a significant impact on their lives. More generally, customers described being able to eat better quality food including extra fruit and vegetables, an outcome which is likely to impact positively on health.

In addition to these outcomes, it is possible to identify other impacts that were a direct result of access to services via Partnership Fund projects. Referrals for mobility aids and home adaptations made it easier for customers to manage their health conditions. Helen, a customer with arthritis and osteoporosis was having to come down her stairs sideways, and was trying to avoid using them when her health was particularly bad. Now that she has had a hand rail installed, she can hold on to both sides and no longer worries about falling.

**Housing**

Increased benefits also led to a range of impacts relating to housing. Being able to redecorate homes and replace furniture were important impacts. For example Rose, a customer who received help applying for Pension Credit, HB/CTB, was planning to renew carpet that had been damaged in a flood, that otherwise she would have been unable to afford. In another case, Mark and Lisa were able to replace their broken hob which they would not have done without the extra money they received by applying for CTB and AA. Where health conditions had made it increasingly difficult for customers to maintain the up-keep of their homes and gardens, an important outcome of increased benefits was the ability to pay for home helps and gardeners.
Direct access to services via Partnership Fund projects also helped customers who had experienced periods of homelessness. A project aimed specifically at the homeless population was able to refer customers to sheltered accommodation and support them in applications for benefits. For example, Adam had been living in the back of his car for six to seven months. After contact with the project he is now in sheltered accommodation and in receipt of Pension Credit. Without this support he thinks he would still be living on the street.

**Independence**

Increased independence as a result of no longer having to rely on family or others for financial support was a key outcome of increased take-up of benefits and customers spoke about no longer feeling like a burden. Being able to travel independently and afford taxis was also an important outcome that helped maintain independence. With a foundation of financial security, customers spoke of feeling more secure. For example, George and June, a couple who thought they would have to sell their house and move into sheltered accommodation because they could not manage its upkeep, were able to maintain it as a result of receiving benefits that increased their income by £100 a week.

Increased access to services also impacted positively on levels of independence. In particular, mobility aids, adaptations to homes and referrals for personal care helped customers manage health conditions which in turn helped them to maintain their independence. For example, Debbie had been struggling to climb the stairs in her home because of pain in her hips. After the installation of two handrails she now finds it a lot easier. At the same time a seat and grip were installed in the bath which means she can now take a bath without fear of slipping. Her husband no longer worries about her taking a bath and she feels happier in herself and enjoys restored privacy in her personal care.

**Social networks**

Having the financial resources to get out and about, socialise with friends, join local associations, go on holiday and meet the costs of visiting family both locally and abroad were all outcomes described by customers and staff. Being able to reciprocate generosity in the form of gifts and share the costs of transport and food were crucial ways in which greater financial security facilitated social networks. In addition to outcomes related to increased benefits, projects also had a direct impact on social networks. Projects based in organisations that supported specific communities were able to link customers into social activities, and customers spoke positively about making friends and meeting people in the same situation as them. In cases where customers lived alone and had limited social networks, these links were particularly important. For example, Project I that supported elderly people from a BME community in an inner-city was able to increase take-up of benefits while also linking their customers to a wide range of social activities run by the parent organisation. In another example, Project F that was targeted specifically at carers, was able to link customers to recreational activities and day trips organised
by their parent organisation, providing respite from caring responsibilities and reducing the isolation that customers in this situation often spoke of.

**Emotional/Psychological outcomes**

Greater financial security as a result of benefit take-up had a positive psychological impact. Customers with increases in income spoke variously about greater peace of mind, less anxiety about money, feelings of contentment, a greater sense of security, and a more positive outlook on the future. Where projects had referred customers to support groups or provided various forms of emotional support, the opportunity to discuss problems and meet people in similar situations were welcome outcomes. For customers of a project specialising in supporting people with mental health difficulties, emotional support was particularly valued. Customers in this situation spoke about the value of having someone to confide in, and the extra confidence this support gave them. This was equally true of customers with more general caring responsibilities, who stressed the importance of having someone they could talk to as an important factor in reducing the social isolation that can occur when caring for a relative with high levels of need.

In addition to the emotional and psychological impacts of increased take-up of benefits and access to services, customers also highlighted the support and advice role of the project worker as an extremely important outcome of contact with Partnership Fund projects. Customers variously described their project worker as a ‘safety net’, ‘a guiding light’ and a ‘life-line’ suggesting that contact with a named worker that they could phone for support in the future was a key and highly valued outcome that promoted peace of mind and security. The following extract from an interview with a couple who received help applying for AA and sign-posting to a carer’s support group illustrates how central the project worker was to their experience:

\[I: \ldots \text{what would you say were the most important things that Nick’s done for you?}\]

\[M \ldots \text{Well I think just keeping in touch with us. Us finding Nick was the biggest thing for us. The other things just came automatically.} \ldots\]

\[F \quad \text{It’s like a lifeline in a way.} \ldots\]

\[M \quad \text{See Nick put us on to \ldots [name of carer support group] and that snowballed from there didn’t it?}\]

\[I \quad \text{So that’s been the important thing.} \ldots\]

\[M \quad \text{That’s the important thing… \ldots meeting Nick, yeah.}\]

(Project J, customers, couple, aged 70 and 69)

**8.4 The significance of impact**

What has been discussed so far is the range of outcomes identified by customers of Partnership Fund projects. It is important to acknowledge, however, that the
significance of these outcomes varied from customer to customer. In some cases, contact with Partnership Fund projects had a tremendous impact. In other cases, the impact was minimal or there was evidence of unmet need, even if some of a customer’s needs had been met.

A number of explanations for minimal impact were evident. Where support had been primarily benefits focused, one simple explanation for low impact was that in some cases customers receiving help with applying for benefits had their applications turned down. In other cases, the effect of a successful benefit application was matched by corresponding reductions in others which, resulted in minimal overall impact. These explanations however, did not account for all examples of low impact. The evidence from the interviews suggests there were two other factors that influenced the level of impact experienced by customers. The first relates to the level of customer need. Arguably, vulnerable customers with the highest levels of need experienced the greatest impacts because they had the most to gain. Where projects managed to meet these needs effectively through intensive and holistic support, the impact on the customer was significant. This is illustrated in the following case study:

Linh is an 85 year old widow and lives on her own. Originally from Vietnam, Linh cannot speak English and has a number of health problems that affect her everyday life. Recently she had been struggling financially and relying on her son for support. This was difficult for her because she felt like she was making life hard for him because he was not earning a lot. After contact with a Partnership Fund project that was embedded within a community centre she regularly visited, she received help applying for AA. The project worker visited her at home and completed the application form for her. When letters arrived relating to the claim, she took these to the project to have them translated.

Linh is now in receipt of AA and her income has increased from £100 a week to £202 which means she no longer feels like a burden on her son and can afford to buy her own food and health supplements, an outcome that makes her feel happier and more independent. Alongside this support from the Partnership Fund project, she has received a wide range of services, accessed via the Community Centre in which the project is based. This support included help arranging hospital appointments, domestic help and support with her transport needs. Without this support she says her life would be very difficult, particularly because of the language barrier.

Conversely, where the needs of customers were less severe, the support they received appeared to hold less significance for them. In these cases, customers welcomed the support they received, but did not consider the impact to be essential or life-changing. This is illustrated overleaf:
Leo and Anne are in their 80s and are both hard of hearing. They both have a range of health problems that have affected their everyday life but despite these they have enjoyed an active retirement, participating in voluntary work, going dancing and taking holidays. Because of their disability they contacted a Partnership Fund project for support with equipment and ended up receiving help applying for AA. The project worker made a home visit and helped them fill in the application form which resulted in a successful claim. Leo and Anne welcome the extra money which has enabled them to go out for meals and treat their grandchildren. However, because they were already financially comfortable, they described the extra income as the ‘icing on the cake’ rather than essential.

What this suggests is that the level of impact experienced by customers depended on their original level of need and the extent to which these needs were met. Customers with high levels of need that had these needs met, experienced significant impacts, while customers that were less vulnerable and with fewer needs, did not experience such significant impacts.

The second explanation for minimal impact is the extent to which projects effectively met customer needs through appropriate support. Where customers were vulnerable and had high levels of need that were not met effectively, this resulted in minimal impact from the programme. The following case-study provides an example of this:

Amy is 84 and was recently widowed. Her husband had always looked after the finances and since his death she had been receiving letters about her pension and finances that she did not understand. She was anxious that she would not be able to pay her bills and was worrying about money. After a referral to a Partnership Fund project, a project worker came out to see her and explained her financial situation to her. Although she was grateful for the help which reassured her, she only had one contact with the project worker and there are no plans for further contact. Since then she has received more letters and remains confused and anxious about money.

The extent to which projects are able to effectively meet the needs of their most vulnerable customers is important. While much of the evidence in the interviews with customers suggests that their needs were met very effectively, as illustrated above, there was nonetheless evidence of unmet need, that is, needs that were articulated but not addressed by a project worker and needs that were not expressed at all by the older person and were undetected by a project worker.

There are a couple of potential reasons why projects may not have adequately met the older person’s full set of needs. One relates to the extent to which the customer perceived those needs to be within the scope of the project. The evidence from interviews with customers suggests that where the issue was not felt to fall within the remit of a project, the customer did not raise their concerns with their
project worker. In one case for example, Louise, who received help applying to the council to have a stair rail installed in her home, spoke about her intention to make enquiries about CTB, but had not approached the Partnership Fund project with this issue, even though this was a service supplied by the project to other customers. Cases like this stress the importance of a holistic assessment to ensure that needs are met as fully as possible.

The second relates to the capacity of projects or even whole partnerships to meet every client need. It is important to acknowledge that there were limitations on what projects could provide and that some needs presented by customers were beyond their capacity to support. An example of this was customers with extensive caring responsibilities. The intensity of caring for a partner or relative placed a great strain on individuals and a number of outstanding needs were expressed, particularly by those who were sole carers. Partnership Fund projects not focusing on carers were able to provide some support and mitigate some of the effects of intensive caring responsibilities, but the extent of these needs meant these needs could not always be fully met.

This chapter has described the range of impacts customers experienced from contact with Partnership Fund projects, and illustrated that outcomes were dependent on the level of need and vulnerability of customers, and the extent to which projects were able to meet these needs effectively. The next chapter will explore the outcomes for the staff, organisations and partners involved in the Partnership Fund.
The previous chapter described the various outcomes of the Fund for customers. The impact of the Fund, however, is not limited to these. There is evidence that the Partnership Fund has affected change on the work and outlook of project staff, in the funded project's parent organisation, and in the network of local services for older people. These outcomes are important because of the contribution they make to older people's lives. But they are important also in their own right because they indicate the impact of the Fund on approaches to delivering services to older people.

Outcomes for staff, the organisation and the local service network are interrelated in that one set of outcomes in turn can contribute to another. Thus, the impact of the Fund on staff contributes to the impact on the organisation. Both have implications for the outcomes for the local service network. For example, the impact of the Fund on project staff's skills at making benefit applications impacts on the nature of the services provided by the parent organisation. These contribute to outcomes for the customer by maximising their income and therefore the money available to spend on local services. The relationships between these different sets of outcomes are explored in this chapter and depicted in Figure 9.1.
The outcomes for project staff are discussed first, followed by those for the parent organisation and finally for local services. The chapter concludes by considering the potential legacy of the Partnership Fund.

9.1 Outcomes for staff

It is important to understand the outcomes of the Partnership Fund for project staff for several reasons. As previously noted, they underpin some of the outcomes experienced by the parent organisation and local services for older people. They also affect customers’ experiences of services and, potentially, the outcomes for them. Finally, because these impacts are focused on the acquisition and development of a set of skills for staff they are not necessarily temporary and are likely to be retained in the longer term. This is key for ensuring the continuation of learning from the Fund beyond its conclusion.
The following outcomes from the Partnership Fund for project staff were evident:

- the acquisition/development of benefit-related skills;
- the acquisition/development of ‘soft’ skills;
- the development of expertise in delivering services to older people;
- personal fulfilment.

These are outlined in Figure 9.2 and discussed in the section that follows.

9.1.1 The acquisition/development of benefit-related skills

It is perhaps not surprising that one outcome of a fund that aimed to increase benefit take-up among a specific group was to improve the skills of the people delivering benefits advice. For those who had not done this kind of work before, the emphasis was on the new skills they had acquired. Those with a background in this type of work spoke more of how working for the funded project had developed their skills. Either way, a number of key areas of skill development were highlighted. Working in a funded project was said to have led to greater understanding of how to conduct a benefit application. This was seen to reduce the time needed to complete an application form and to increase likelihood that a claim would be successful. A key factor underpinning this was the opportunity the Fund gave to develop nuanced approaches to enabling customers to impart the sensitive and personal information that benefit application forms required. In addition, there was a belief amongst some that the Fund had increased awareness of whom it was appropriate to ask to support a claim (e.g. health professionals) and how to involve them.

Gains were also made in negotiating and comprehending more complex parts of the benefits system. The experience of leading benefit appeals had undoubtedly increased staff confidence and abilities. The requirement in some funded projects to specialise in a certain area of benefits work, for example disability benefits such as Attendance Allowance (AA) and Disability Living Allowance (DLA), or to work with a broader range of benefits than before, for example including Carers Allowance (CA) for the first time, was also a feature of this. There was evidence also that staff had developed an appreciation of how different benefits worked together. This was particularly evident from the observations of staff-customer encounters where staff demonstrated the ability to make fast decisions about the best combination of benefits for an individual and about which benefit claims to initiate first, for example, that a successful claim for Pension Credit could confer eligibility for Housing Benefit (HB) and Council Tax Benefit (CTB). Such decisions often took account of complex eligibility rules and were critical for ensuring claims were made in a timely manner and customers’ income was maximised. This in itself is an example of how staff outcomes from undertaking Partnership Fund work can generate positive results for customers.
Partnership Liaison Manager (PLMs) too laid praise on some project workers for their ability to navigate a complex and sometimes bureaucratic system. However, this praise was not universally expressed. Rather, there was more emphasis amongst some on instances where benefit claims had not been correctly carried out. This was felt to have resulted from a lack of engagement with the training and support that could be offered by the Pension Service Local Service (PSLS):

‘With Carers Allowance, the benefits are very complicated. They [the project] went sadly wrong with one case last year and we’ve had to go back again and look at the procedures and make sure that everybody there knows that they can run past scenarios past myself or anybody here, before they start filling the forms in. It is a complex area that they’re in with carers and Carers Allowance.’

(PLM)

9.1.2 The acquisition/development of ‘soft’ skills

The acquisition and development of ‘soft-skills’ was also said to result from involvement in the Partnership Fund project. Staff described an improvement in their ‘people skills’ from the face-to-face and one-on-one nature of their work with customers of their service. Underpinning these people skills was the development of a specific set of attributes including patience, persistence, tact, and listening skills that were all important for ensuring effective interactions with customers. The development of these soft skills was not however limited to staff relationships with customers. Staff also identified that they had acquired important insights into effective team working, both with other Partnership Fund project staff and the wider parent organisation. This had been achieved because the location of most Partnership Fund projects within a parent organisation meant it had been important for project staff to work with other colleagues so that they understood the project’s activities and could make effective referrals between their services. This is a clear example of where outcomes for staff contributed to the outcomes experienced by the parent organisation, both of which contributed to better access to services for customers, a key outcome for this group.
9.1.3 The development of expertise in delivering services to older people

The acquisition of soft skills and benefit-related knowledge were part of the development of a broader expertise in delivering services to older people. It was evident from the range of skills staff described that their involvement in project work had enabled them to acquire a ‘tool-kit’ for working with older people. This comprised skills for identifying and engaging with customers, and for delivering services to different types of customers. The range of approaches described in Chapters 5 and 6 (dealing with targeting customers and the delivery of services, respectively) demonstrates this. In addition, from their intensive work with customers, staff had developed expertise in recognising specific types of customer need, for example those pertinent to older people with disabilities or carers, and issues relevant for particular groups of older people, such as those from Black and Minority Ethnic (BME) communities. As well as recognising customers’ needs, staff
were better able to respond to them. Because of their involvement in partnership working and their resulting understanding of the work of their different partners, staff had an improved awareness of the range of services available to customers and were able to refer people appropriately to meet their needs.

It was clear from the observations of staff-customer encounters that staff had not only developed this range of skills and approaches for delivering services but also a level of sophistication about how to use them in order to respond appropriately to an individual customer’s needs. For example, during a post-observation interview, a member of staff from Project H described the way he had tried different approaches, including humour and empathy, to try to engage with a new customer. He explained that staff could never be sure how a customer would behave and therefore that it was important not to approach appointments with fixed ideas about what would happen.

9.1.4 Personal fulfilment

The outcomes for staff described so far all refer to the progression of workplace skills. There was also evidence that staff had gained personal fulfilment from their involvement with the Partnership Fund and, indeed, that they saw this as an equally important outcome. Meeting people they would not otherwise encounter and making personal connections with customers contributed to a strong emotional connection with the work. Staff also said they were moved by the difference their work could make to customers’ lives and saw what they did as something they cared about rather than ‘just work’. This is reflected in the comments of one project manager:

‘You’ve only got to talk to some of them [project delivery staff] and they’ll tell you about different clients and about the difference it’s made to their lives, and how much, you know, they’re moved by that. They really are.’

(Project J, staff)

Job satisfaction was another important element of the personal outcomes experienced by staff. There were several factors that contributed to this. The first was that staff saw their work as interesting, varied and exciting, and they described a renewed enthusiasm for it since the commencement of the Partnership Fund project. They relished the opportunity to use their initiative and to be creative in their work on a daily basis and gained satisfaction from the feeling that they were constantly learning. The ‘real sense of achievement’ staff experienced in overcoming the barriers presented by customers who were reticent to initiate benefit claims, or from winning benefit appeals, was also important. This was underlined by the positive feedback they received from clients:

‘I’ve never had a job where I’ve enjoyed myself more than doing this…you meet so many different people, you never know what’s going to happen next... there are a lot of people coming up to me and sort of grabbing me by the arm and saying, ‘You’re doing a great thing,’ and of course it does sort of polish the ego a bit, but I just love being out there.’

(Project A, staff)
There were, however, some negative outcomes for staff on a personal level. Staff described their work with older people as ‘taxing’ and ‘exhausting’, especially where customers had complex needs or their circumstances were particularly distressing. They felt this had implications for their confidence in their abilities to perform their job role and, ultimately, their performance. Here, the provision of appropriate support (as discussed in Chapter 4) was crucial, for example, being able to share experiences with other team members. The sense of satisfaction staff experienced from their work also helped to negate these less positive outcomes:

‘It can be very draining, yes, it can be very draining, very draining. If I’ve had a particularly difficult visit...it’s helpful to be able to go back to the office and say, “Difficult visit there”. I had one the other day and...I went back to the office and sort of off-loaded onto the social worker next to me.’

(Project K, staff)

9.2 Outcomes for the (parent) organisation

The different processes employed by organisations to target customers, deliver services, and work with partners were described in Chapters 5, 6 and 7. These had clear effects on the organisations concerned, evident in:

- the scope of the services offered;
- the organisation’s practices;
- enhancement of the organisation’s profile.

These impacts are described here and summarised in Figure 9.3.

The scope of the services offered by organisations changed in two ways as a result of the Partnership Fund. Firstly, the Fund enabled organisations to review and modify their service offer. Organisations that had previously focused initiatives on one type of service or one type of customer broadened their provision. This widened scope was facilitated by an expansion in the organisation’s own services or by the development of a network of referral partners. It was a reflection of organisations’ recognition that customers did not necessarily present needs in isolation and therefore that they should be approached holistically. For example, the benefits advice service offered by Project J existed prior to the Partnership Fund. The funding however allowed the organisation the additional resources to be able to set this within the context of advice about how to manage money in order that customers felt the maximum impact of additional benefits. The project was also enabled to develop a wider network of partners to whom they referred customers for needs outside their remit of financial advice.
The second way that the scope of services altered was the way in which customer focus changed. This manifested in either a diversification or narrowing of the target customer group. As described above, the Partnership Fund encouraged funded organisations to consider their customer group carefully. Where the Partnership Fund project focused on a new sub-set of the organisation’s target population for whom a specific service had not been available before, this led to a broadening of the parent organisation’s customer base. For example, Project L was established to support older people who are hard-of-hearing, in contrast to the parent organisation that had historically focused more heavily on deaf people who signed. Conversely, in other cases, the Partnership Fund allowed the parent organisation to specialise in helping a specific group of customers. Project F, for example, was established to provide support to carers over 60 years of age. Prior to the Partnership Fund, the parent organisation included older people in its target customers but offered few services specifically for them. As well as having implications for the scope of the parent organisation, these changes in customer focus impacted upon outcomes for staff since they necessitated the development of a range of different skills among project staff (see discussion in Section 7.1).

The parent organisations’ practice changed as a result of the Partnership Fund. The nature of these changes is discussed in detail in Chapters 5, 6 and 7 therefore have not been repeated here. These changes in practice served to diversify the parent organisation’s repertoire of skills and approaches. Even where there were insufficient funds to continue the specific Partnership Fund project post-funding, staff recognised that the project had served to demonstrate new practices that the parent organisation could employ in the future or use as a model for other service offers.

A final outcome of the Partnership Fund for the parent organisation was the enhancement of its profile. This was achieved in several ways. First, through

---

### Figure 9.3 Overview of outcomes for the parent organisation

<table>
<thead>
<tr>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scope of service</strong></td>
</tr>
<tr>
<td>• Broader/specialised service offer</td>
</tr>
<tr>
<td>• Broader/specialised customer focus</td>
</tr>
<tr>
<td><strong>Practice</strong></td>
</tr>
<tr>
<td>• New approaches to targeting, engaging and delivering services to customers</td>
</tr>
<tr>
<td>• More/stronger partner relationships</td>
</tr>
<tr>
<td><strong>Profile</strong></td>
</tr>
<tr>
<td>• Raised awareness among other organisations and customers</td>
</tr>
<tr>
<td>• Enhanced credibility</td>
</tr>
</tbody>
</table>
the Fund, the parent organisation was able to associate with a range of credible agencies via improved partner relationships. These associations reflected well on the parent organisation and raised its profile among local services. The parent organisation also became better known among the project’s target customers because those who used the funded project’s service became more aware of the wider remit of the parent organisation. Finally, staff felt that being awarded funding, particularly by a Government department, acted as a further marker of credibility. They identified that the enhancement of the organisation’s profile, an impact of the Fund in itself, led to other outcomes such as an increased willingness among other organisations to work with it and a greater number of customers using its services.

9.3 Outcomes for the local service network

Chapter 7 identified the aims partners had for working together. Where these aims were met, the conditions for which are explored in that chapter, these constituted the outcomes for partners. For example, successful partnerships resulted in increased capacity for partner organisations where the Partnership Fund project undertook a proportion of their workload. Partners also drew on each others’ expertise, which allowed them to meet a broader range of their customers’ needs. As noted above, working with other organisations also served to enhance partners’ image and profile.

The remainder of this section explores the impact of the Partnership Fund on the local service network, specifically:

- the strengthening and extension of service networks;
- the stimulation of competition;
- changes in the demand for different services and how they were paid for.

Each is discussed below and summarised in Figure 9.4.

The Partnership Fund encouraged local services to work together in a variety of ways. The outcome of this for the networks of local services was to both strengthen relationships within them and extend them. For example, where services were aware of each other as a result of partnership working initiated by funded projects, referrals between these agencies were more likely. As well as potentially increasing the number of referrals between agencies, staff and partners also identified that such referrals were likely to be more effective because they had a better understanding of the remit of other services. Some projects were unable to isolate the specific impact of the Partnership Fund on their partnership activities. Because of this, it is difficult to isolate the nature of the impact. However, the evidence suggests that this outcome for local services has implications for the experience of customers in that it may have meant that a larger portion of customers’ needs were met.
A further outcome for local service provision, identified by staff, partners and PLMs, was that it stimulated competition locally between services that catered for the needs of older people. There were different views about the effect of this. This increased competition was felt by some to be a welcome effect because it forced organisations to think creatively and to ensure that their service was fit for purpose. This, it was argued, would guarantee the appropriate mix of services for older people in the community. As long as different agencies were aware of each other’s remit and customer focus, staff maintained that services could be developed to complement each other and plug service gaps rather than exacerbate competition.

Conversely, it was seen by others to have a profoundly negative effect on the local service infrastructure. This was the view of PLMs who had expressed scepticism of the Fund and its objectives. The lack of coordination that sometimes occurred between the PSLS and the Partnership Fund project was seen to waste valuable resources. In addition, it was argued that the preference awarded to the funded projects was destructive to relationships within the local service area. This was said to have resulted in a lack of cooperation in local activity by those who had applied for funding but were unsuccessful.

Finally, there was evidence to suggest that the Partnership Fund affected the distribution of demand for local services. Project staff and partners noted that they felt able to refer more customers to paid-for services where older people had made successful benefit claims and were therefore receiving more money. Where older people had been using a free service, provided by a charity or volunteer organisation, their increased benefit payments enabled them to buy in paid-for services thus reducing the burden on the free ones. The demand for services for older people was therefore re-distributed across different paid-for and free services.

Related to this, the positive effect of the Fund on older people’s incomes also affected how public services for older people were funded. Where in the past older people on low incomes had received free services from their local authority, their increased income now meant that they could make a financial contribution where
their local authority had operationalised a Fairer Charging system. This served to maximise the revenue of the local authority. For example, staff at Project G, a benefits advice service located within a local authority, explained that the increase in income they achieved for customers as a result of successful benefit claims benefited other departments within the LA. Project staff shared information about successful claims with Social Services who then visited a customer to evaluate their ability to contribute to their support charges. Staff at Project J claimed the extra local authority resources generated in this way had contributed to a reduction in Council Tax charges. Unsurprisingly, these sorts of effects underpinned some of the enthusiasm and commitment shown by local authorities to benefit maximisation for older people.

9.4 The legacy of the Partnership Fund

A chief aim of the Partnership Fund was to generate good practice that would survive after it came to an end. This was seen as important because the Fund itself was a finite resource that would not be renewed. This section evaluates the extent to which the Partnership Fund achieved this aim by drawing on this chapter’s discussion of the outcomes of the Fund for staff, the organisation and the local community.

An important component of this legacy was the range of skills and expertise in providing services to older people acquired by project staff. Projects placed great emphasis on having experienced staff and, where organisations have been able to retain staff with the help of alternative funding, they will also retain the skills acquired under the Partnership Fund. The likelihood of staff retention within the sector is also high given the positive personal outcomes for staff. That they have been exposed to new ways of working that both inspire and satisfy them, and that they can draw upon in the future, is arguably as important as the survival of individual schemes.

The impacts identified for the Partnership Fund project parent organisation are important because they signify the development of services for older people upon which future initiatives can be modelled and therefore the learning from the Fund can lead to other opportunities. They may even negate the need for future initiatives if organisations can adopt this learning and carry it forward into the other services they offer. Similarly, some of the outcomes identified for the local community could also feasibly continue post-funding. Those outcomes underpinned by the increase in older people’s income should continue as long as their eligibility for benefits remains unchanged. As for those outcomes for staff and the parent organisation, where agencies within the local network of services for older people can model.

---

Fairer Charging is a means test to determine a service user’s ability to contribute to support charges. It aims to ensure that people are not worse off as a result of Supporting People and that those who cannot afford to pay for their support charge receive financial help.
future partnership working on that undertaken under the Partnership Fund, the outcomes identified for the local community are sustainable too.

It is clear that this aim to continue the effects of the Fund beyond its end was recognised by project staff who reflected upon it when considering the learning they could take from their work under the Partnership Fund. Some felt confident that they would be able to take this learning forward in the future and build on it, stating that the Partnership Fund had shown organisations how initiatives for older people could operate or given them an opportunity to put existing skills into practice. Others, however, were less confident and highlighted that their organisation had planned no exit strategy from the work they were undertaking for the Partnership Fund so feared the problem of reaching hard-to-reach older people would recur and important work would be lost.

Amongst the PLMs interviewed for the qualitative case studies, there were mixed views about the success of the Fund in meeting this aim, undoubtedly overshadowed by the degree to which they subscribed to the aims and objectives in the first place. Where they were positive, PLMS emphasised the advantages of being able to try out new ways of working locally and new ways of engaging older people. However, there were also concerns about how this legacy could be sustained and how the learning from it could be integrated into all local organisations, including the PSLS. Where they were negative, they highlighted how the discontinuation of these pilot projects might actually ‘create’ future gaps by stimulating a demand for a service that could not be continued. The more sceptical were of the view that the local service could have achieved the same outcomes – for customers – ‘quicker and for less money’. However, since they did not have access to reliable data about the outcomes of projects, PLMs admitted that their judgements about the success of projects were, to some extent, impressionistic and therefore potentially inaccurate. They also, clearly, do not take account of the wider effects of the Fund on services for older people in the local community.

The next and final chapter of this report builds on the discussion of outcomes here and discusses the key implications of the evaluation.
10 Conclusion

The purpose of this chapter is to pinpoint the key implications of the evaluation for policy that seeks to maximise older people’s access to benefits and services and for the organisations delivering them.

10.1 Funding innovative services for older people

The findings indicate that designing and implementing innovative services for older people is no easy task. For projects funded by the Partnership Fund, their ability to effectively engage with the aims of the programme was influenced by four fundamental issues: the stability of funding; the degree to which projects were able to think or act strategically; the level of expertise they have; and where they are located. There is no one formula across these four different project characteristics that can bring about success. Rather, what we do know is that instability in one of these foundations can make it difficult for organisations to build a robust initiative. In this respect, local services aimed at working with older people face the same challenges experienced by many other community-based organisations.

The stability of funding is undoubtedly key to these organisations. Where there were deficiencies in the other three foundations, it was related to the financial security of projects. We have seen the sorts of implications this had for the expertise they could attract and their ability to formulate workable solutions for the problems presented by older people. Smaller voluntary organisations are particularly vulnerable here. Indeed, the research indicates that more could be done to build the capacity of these organisations to apply for such funding. It is clear that the project staff had varying levels of ability and experience in completing applications for funding, putting less experienced organisations at a disadvantage. Furthermore, there was evidence that smaller organisations had more modest expectations of the level of funding they might receive which served to limit the amount they requested in their application and, ultimately, the resources they obtained.

Creating a more stable funding base for the work that these organisations carry out is clearly important in supporting this sort of innovative work with older people in the community. Without it, the time-limited nature of funding can mean that some
organisations, particularly the smaller, voluntary agencies, will continue to invest effort in supporting the services they offer, sometimes at the expense of service development and innovation. That said, there is clearly a role for examining how organisations use the funds allocated to them by programmes like the Partnership Fund. While such an investigation was outside the scope of this evaluation, there was some evidence to suggest that organisations were more or less effective in utilising the financial support they were awarded.

There are also other lessons for those involved in designing funding programmes. The foundations outlined provide a map of the key organisational criteria which should be taken into account. It will be important to make clear to potential applicants the role that these different project characteristics can play in building effective services.

10.2 Targeting older people and delivering services to them

The effective targeting of customers and delivery of services to them is fundamental to enhancing their welfare and maximising their income. The evaluation has highlighted a rich tapestry of methods for engaging older people in local services, whatever the target group. Likewise, there are very consistent messages about what works in delivering services to older people. One important aspect of this is where the contact with the older person takes place. The evidence presented underscores the value of different channels for working with older people. It also gives strong support to out-of-office activities, particularly community outreach events and home visits. Moreover, the case studies have generated considerable understanding of what matters in service encounters with older people. They have pinpointed the subtle but intelligent ways in which projects and their staff have generated workable solutions to overcoming the very real barriers that older people experience to engaging in services and taking up benefits.

The work of the funded projects indicate that there is no one right way of working with older people. So many of the ways of targeting and engaging customers uncovered by the evaluation stress the importance of a flexible responsive approach that meets the unique needs of each individual older person. They highlight the importance of having a ‘tool-kit’ of resources for reaching out to and helping older people.

These ways of working are resource intensive, again underpinning the importance of adequate levels of funding and the effective deployment of resources. The time taken to implement them effectively should not be underestimated. But there is evidence to suggest that the outlay of resources in the short term could off-set the need to expend other resources in the future. If a project worker can develop trust and a rapport with an older person, they may overcome barriers that might take a range of other services far greater resources to overcome on multiple occasions, if at all.
The innovative nature of the approaches outlined validate the very purpose of the Fund. The generation of this sort of learning was, after all, one of the main reasons it was set up. The nature of what works suggests that quite specialist skills and understanding are required to effectively deliver services to older people. This underlines the importance of specific training for those attempting to deliver public services to older people, whether they work in the statutory or voluntary sector.

There is much detailed good practice identified in the report that will be useful to community-based organisations planning, delivering or reviewing services for older people. Moreover the findings will serve to validate many good approaches of those who currently work directly with older people whether they are based in the Pension Service Local Service (PSLS) or within other community-based organisations. There is also much here that will be of use to the Pension Service in enhancing its understanding about what works in engaging older people in its services. It was not always clear that good practice was transmitted effectively at the local level due to the variability in the quality of relationships formed and the communication between the PSLS and the funded projects. This presents a challenge for the Pension Service to think of how best to communicate these findings through the organisation and more widely. The general messages about what interests and engages older people should filter its way into Pension Service policy and working practices more generally. The other components of the LinkAge programme will undoubtedly be bolstered by the learning generated by the Partnership Fund.

10.3 The importance of a holistic approach to meeting the needs of older people

The older people interviewed presented two sets of needs. One concerned a plethora of financial issues and the other a very broad range of social welfare concerns. The Partnership Fund was set up to look at both of these issues, albeit with a greater emphasis on income maximisation, in the hope that this also would improve the welfare of older people.

The success of those projects that were more holistic in their focus was striking. That is not to say that projects that focused on benefits only were not effective at income maximisation. Nonetheless the application of a holistic approach by certain projects has highlighted how important this approach is to meeting the diverse range of needs that older people present. This finding offers strong support for policies that aim to bridge the gap between local services for older people, such as the Pension Service LinkAge programme, particularly initiatives such as Joint Teams and Alternative Offices. It also underlines the importance of Local Strategic Partnerships and other collaborative activity that may not necessarily be focused on older people. Indeed, the study suggests that it is unlikely that one service will ever reach and engage every customer. A range of services, including the PSLS, are therefore necessary to facilitate the broadest range of older people accessing...
services. What is key is that such services work together and communicate with each other to facilitate appropriate referrals between them to ensure all customer needs are met.

The findings do not support any one model of delivering this holistic or joined-up approach. Those funded projects that were more holistic in nature operated in a variety of ways, ranging from the ‘one stop shop’ model which physically brought together the work of many partners to address the needs of the older person, to a ‘personal adviser’ model which created a figure head who was pivotal in making the different services work in unison. Instead, the findings underscore two important considerations. First, that whatever their first point of contact, there are advantages to the older person’s needs being appraised holistically. Second, the delivery of different services works best where it appears seamless, whether one organisation or ten is involved.

10.4 Partnership working between services for older people

The evaluation has shown the value of what can be achieved through local partnership working. The difficulties of bringing different organisations together in shared vision or joint working should not be underestimated. In this respect, the multiplicity of relationships formed and, as a consequence, the sheer variety of services available to some funded projects was impressive. This offers strong support to policies that facilitate (and ultimately fund) this kind of work.

The study highlighted a number of issues that underpinned effective partnership relationships. These will help local services to reflect on the most appropriate relationships to suit their needs. The issues outlined by the evaluation might act as a check-list of issues organisations should be aware of as they forge partnerships and as they work with their partners to ensure the most effective working.

Nevertheless, the evaluation has also shown how challenging partnership working can be for some organisations, requiring a considerable shift in organisational culture and individual mindsets. These challenges are reflected in the very different interpretations of ‘partnership’, not to mention different levels of involvement in it. The fact that some funded projects were not engaged in any kind of partnership is perplexing given the remit of the Fund. This may reflect the well-documented difficulties of creating partnerships in local communities. It also reflects how some local projects struggle with this essential aspect of providing local services and underlines the importance of reflecting on the arrangements for joint working before approaching partnerships. However, it also raises questions about how the Fund was advertised and about the guidance given to potential applicants and funded participants. There may have been a role that Partnership Liaison Managers (PLMs) could have usefully played here in brokering partnerships at the local level and capacity-building in partnership activity, especially with the smaller organisations that had less funding. The fact that it did not happen reflects on the less than satisfactory steer that was given to PLMs when the Fund was set up.
Better clarity about the role of the Local Service in the Partnership Fund in general, for PSLS staff and for funded projects, would undoubtedly have contributed to closer and more effective working between them. It is clear that there is not universal understanding in the PSLS of the need for partnership with community organisations, the functions it can fulfil, and the benefits that it can reap – not just for older people but for the whole community. It is also apparent that difficult historical relationships between the PSLS and other services, and the challenges of forging new relationships between organisations with different structures and cultures, may take some time and effort to overcome. Where there was evidence of strong cooperation between PLMs and funded projects, there was admiration for the expertise of those in the Local Service and appreciation of how this could help local projects to better help older people. Where it was not evident, it appeared to be an opportunity missed.

10.5 The value of the Partnership Fund

The evaluation framework set out at the beginning of the report outlined what this programme was meant to achieve – that is – its ‘theory of change’. The theory was that local innovative services would have the requisite knowledge, insight and skill to increase the level of benefit take-up amongst older people and to involve them in local services. There is no doubt that funded projects have achieved this. Estimating the monetary value of it in terms of increased benefit payments to older people is beyond the scope of this study.

Nevertheless, the findings from this study have illuminated the beneficial ways in which funded projects have developed services for older people that can overcome barriers. It has also demonstrated the important positive impact on the older person where this is achieved. Moreover, it has highlighted benefits for local organisations and the people who work in them. The nature of this second set of outcomes suggests that the investment made in the Partnership Fund will continue – in the way that people who plan local services now think about what works in engaging older people and in the way individual project workers go about the difficult and complex job of convincing older people that they are eligible for benefit and that there are services out there that can help them.
Appendix A
Quantitative recruitment documents
Introductory letter

Dear

NatCen Evaluation of the Partnership Fund

As you will probably be aware the Department for Work and Pensions has commissioned independent researchers, the National Centre for Social Research (NatCen), to undertake an evaluation of initiatives funded by the Partnership Fund.

As your Partnership Fund initiative was chosen for the case study element of the evaluation you will have already been contacted by the research team at NatCen with regard to taking part in the qualitative element of the research. I would like to take this opportunity to thank you for your cooperation.

This letter is with regard to another component of the evaluation - a general survey of all 172 projects operating within the Partnership Fund. The survey will cover questions concerning the activities undertaken by projects and outcomes achieved. This is scheduled to happen in the next couple of months.

This letter formally asks for your co-operation with this stage of the research.

It is the evaluators’ aim to minimise the burden on your time. The research will be conducted at times most suitable to you, your staff and customers. I would like to reassure you that all information gathered during the evaluation will remain confidential. Individual projects, their staff and customers will not be identifiable in the final report. All data will be handled and stored in accordance with the Data Protection Act.

We very much hope that you agree to participate in this stage of the evaluation, the outcomes of which will be twofold. First, participation will enable us provide you with some detailed insight into and feedback about your practice. Second, results from the evaluation will feed into a good practice guide which will aim to ensure that elderly people continue to have access to the benefits and services to which they are entitled and require.

The researchers from NatCen will contact you by letter within the next three months to provide further details of the research. In the meantime, if you have any questions concerning the evaluation, please do contact Vicky Petrie (DWP Project manager for the study) on 020 7962 8555.

Yours sincerely

Gwen Wolf

LinkAge Programme Team, DWP
Advance letter – projects participating in the qualitative case studies

Dear

NatCen evaluation of the Partnership Fund

I am writing to ask for your participation in the Evaluation of the Partnership Fund. The evaluation is being conducted on behalf of the Department for Work and Pensions by NatCen, an independent social research institute. You may remember receiving a letter from The Pension Service recently about this intended research. The study will contribute to the development of a good practice guide aimed at ensuring older people have access to the benefits and services to which they are entitled. As you have also been asked to take part in the qualitative element of this evaluation, I would like to take this opportunity to thank you for your continued co-operation with this research programme.

We would like to conduct a telephone interview with someone who manages or delivers the service offered by your Partnership Fund project. This person should be able to give us information about how your Partnership Fund project operates and the services it offers to older people. If this does not apply to you, please pass this letter on to the most appropriate person.

To ensure that the telephone interview can be conducted as quickly and easily as possible, an information sheet has been included with this letter to be completed by you and/or another appropriate person before the telephone interview is conducted. The information sheet is used to record facts that you might not have readily to hand during the interview and should be retained for use during the telephone interview – it does NOT need to be returned to us. Instructions on how to complete the form are included in the information sheet.

We will be conducting interviews between [date] and [date] and will contact you by telephone in office hours during this period. Alternatively, if there is a day or time within these dates you would prefer to be contacted, please call: 01277 235200 to make an appointment with one of my colleagues who will conduct the interview. The telephone interview is intended to take less than 30 minutes to complete. We understand that you and your colleagues are busy and are grateful for your participation in this important research.

If you have any questions about this study please do not hesitate to contact me on 020 7549 7038 or at j.maher@natcen.ac.uk.

Yours sincerely

Joanne Maher
Senior Researcher
Advance letter – all other projects

Dear

NatCen evaluation of the Partnership Fund

I am writing to ask for your participation in the Evaluation of the Partnership Fund. The evaluation is being conducted on behalf of the Department for Work and Pensions by NatCen, an independent social research institute. You may remember receiving a letter from The Pension Service recently about this intended research. The study will contribute to the development of a good practice guide aimed at ensuring older people have access to the benefits and services to which they are entitled.

We would like to conduct a telephone interview with someone who manages or delivers the service offered by your Partnership Fund project. This person should be able to give us information about how your Partnership Fund project operates and the services it offers to older people. If this does not apply to you, please pass this letter on to the most appropriate person.

To ensure that the telephone interview can be conducted as quickly and easily as possible, an information sheet has been included with this letter to be completed by you and / or another appropriate person before the telephone interview is conducted. The information sheet is used to record facts that you might not have readily to hand during the interview and should be retained for use during the telephone interview – it does NOT need to be returned to us. Instructions on how to complete the form are included in the information sheet.

We will be conducting interviews between [date] and [date] and will contact you by telephone in office hours during this period. Alternatively, if there is a day or time within these dates you would prefer to be contacted please call: 01277 235200 to make an appointment with one of my colleagues who will conduct the interview. The telephone interview is intended to take less than 30 minutes to complete. We understand that you and your colleagues are busy and are grateful for your participation in this important research.

If you have any questions about this study please do not hesitate to contact me on 020 7549 7038 or at j.maher@natcen.ac.uk.

Yours sincerely

Joanne Maher
Senior Researcher
Information sheet

Evaluation of the Partnership Fund

Information Sheet

The Evaluation of the Partnership Fund will contribute to the development of a good practice guide aimed at ensuring older people have access to the benefits and services to which they are entitled.

We would like to conduct a telephone interview with someone who manages or delivers the service offered by your Partnership Fund project. This person should be able to give us information about how your Partnership Fund project operates and the services it offers to older people.

To ensure that the telephone interview can be conducted as quickly and easily as possible, it will help if this information sheet is completed by a person with detailed knowledge about the Partnership Fund project before the telephone interview is conducted. The information sheet is used to record facts that you might not have readily to hand during the interview and should be retained for use during the telephone interview – it does NOT need to be returned to us. If you have any problems or would like to discuss the information sheet in more detail please contact: Joanne Maher on 020 7549 7038 or Natasha Wood on 020 7549 7039.

Please follow the instructions at each question.

Q1 For the purpose of this study we are interested only in the work undertaken with Partnership Fund money. We will refer to this as the ‘Partnership Fund project’. To make sure that we are referring to the same thing in the telephone interview could you please tell us the name you use to describe your project?

WRITE NAME .............................................................. ....Go to Q2

Q2 Could you tell me the name(s) of the person who completed the majority of the Information Sheet?

WRITE NAME ............................................................................................ Go to Q3

Q3 Could you tell me what role in the Partnership Fund project the person who completed the majority of the Information Sheet has?

Tick one box

Organisational director / manager ................................................. Go to Q4

Management committee member ............................................... Go to Q4

Project manager ............................................................................. Go to Q4

Project worker - including benefits adviser .................................. Go to Q4

Administration worker ................................................................. Go to Q4

Volunteer ......................................................................................... Go to Q4

Someone else – please specify ........................................................ Go to Q4
Q4 In which year did the Partnership Fund project start to deliver services?

Tick one box

2004..................................................  Go to Q5
2005..................................................  Go to Q5
2006..................................................  Go to Q5

Q5 In which month did the partnership fund project start to deliver services?

WRITE IN Month ................................................. Go to Q6

Note: The month that the project started to deliver services may be different from when the funding was received.

Q6 Was this the planned start date or were there delays in getting up and running?

Tick one box

Planned start date ..................................................  Go to Q8
Delays ....................................................................  Go to Q7

Q7 What caused the delays in getting up and running?

Tick all boxes that apply

Difficulties recruiting suitable staff ................................  Go to Q8
Took longer than expected to develop partnerships ..........  Go to Q8
Promotional literature not ready in time ........................  Go to Q8
Other – specify ................................................................ Go to Q8

Q8 Some projects operate as part of another parent organisation and some operate as independent projects.

The parent organisation is the organisation within which the Partnership Fund project operates.

Is this Partnership Fund Project .................................. Tick one box

Part of another organisation ......................................  Go to Q9
Part of more than one organisation .............................  Go to Q9
or NOT part of another organisation? ..........................  Go to Q10
Other – specify ................................................................ Go to Q9
**Q9** Which organisations is the Partnership Fund Project part of?

<table>
<thead>
<tr>
<th>Write the names of <strong>at most</strong> three parent organisations of the partnership fund project.</th>
<th>What type of work does the Parent Organisation do (for example, advice service)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include those parent organisations that the Partnership Project works with most often.</td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
</tbody>
</table>

Go to Q10

**Q10** The next table of questions asks about organisations that you work in partnership with and the nature of the relationship with those organisations.

By ‘partnership’ we mean that the Partnership Fund project works with other organisations or agencies in the delivery of its services. This partnership working could involve customer referral or information sharing between these organisations or agencies.

Please answer the questions in columns A, B and C and tick the boxes in the grid that apply to the organisations listed in Column 1.
<table>
<thead>
<tr>
<th>Column 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pension Service</td>
</tr>
<tr>
<td>Social Services</td>
</tr>
<tr>
<td>Housing Benefit Office</td>
</tr>
<tr>
<td>Local Council</td>
</tr>
<tr>
<td>Local Church/religious group</td>
</tr>
<tr>
<td>Council Tax Office</td>
</tr>
<tr>
<td>Police Service</td>
</tr>
<tr>
<td>Health service/ clinic/ GP practice</td>
</tr>
<tr>
<td>Advice service e.g. CAB/ Age Concern</td>
</tr>
<tr>
<td>Local Voluntary organisation</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>A</th>
<th>Tick all of the organisations you work in partnership with?</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>What is the nature of the partnership working with this organisation?</td>
</tr>
<tr>
<td>B1</td>
<td>Partner assists with delivery of the Partnership Fund services</td>
</tr>
<tr>
<td>B2</td>
<td>Partner delivers the service on behalf of the project</td>
</tr>
<tr>
<td>B3</td>
<td>Referral relationship</td>
</tr>
<tr>
<td>B4</td>
<td>Share information</td>
</tr>
<tr>
<td>B5</td>
<td>Other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>C</th>
<th>Was your organisation working with this partner before the Partnership Fund Project began?</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Write in Yes/no</td>
</tr>
</tbody>
</table>

Go to Q11
Q11 The following questions are about how the Partnership Fund money has been used by the project. This information will help us understand what the Partnership Fund project sees as priority to spend the Partnership Fund money on and will help us understand what the money has enabled the project to do.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What uses have been made of the Partnership Fund money</strong></td>
<td><strong>Which of these uses of Partnership Fund money has been the largest expenditure for the project in terms of the proportion of the funding used to finance it?</strong></td>
</tr>
<tr>
<td>Premises – rent and running costs including IT equipment</td>
<td></td>
</tr>
<tr>
<td>Staffing</td>
<td></td>
</tr>
<tr>
<td>Staff training</td>
<td></td>
</tr>
<tr>
<td>Mail-outs – including production of letters and postage</td>
<td></td>
</tr>
<tr>
<td>Production and printing of leaflets</td>
<td></td>
</tr>
<tr>
<td>Advertising in local newspapers</td>
<td></td>
</tr>
<tr>
<td>Posters</td>
<td></td>
</tr>
<tr>
<td>Roadshows</td>
<td></td>
</tr>
<tr>
<td>Other promotion of service</td>
<td></td>
</tr>
<tr>
<td>Transport / travel expenses</td>
<td></td>
</tr>
<tr>
<td>Establishing links with other organisations</td>
<td></td>
</tr>
<tr>
<td>Other costs involved in delivering service</td>
<td></td>
</tr>
<tr>
<td>Other - specify</td>
<td></td>
</tr>
</tbody>
</table>

Go to Q12

Q12 What things is the Partnership Fund project doing differently in promoting services as a result of partnership funding?

By promoting services we mean the way the Partnership Fund project tells potential customers about the services offered, for example by advertising in newspapers and/or newsletters, mailing out leaflets or leaving them in appropriate venues or conducting roadshows and other outreach events.

Tick all boxes that apply

Now promoting services that didn’t before funding

Identify different ways to promote services

Able to contact more people

Promote a different range of services

Go to Q13
Other – please specify

............................................................................................................................................................................. Go to Q13

Doing nothing differently ................................................................. Go to Q14

Q13 In your opinion have the changes made in promoting services resulted in more contacts with customers?

Tick one box

Yes ........................................................................ Go to Q14

No ........................................................................ Go to Q14

Don’t know, don’t keep a record of contacts with customers............................................... Go to Q14

Aims of the Partnership Fund Project

Q14 The next questions ask about the aims of the Partnership Fund project

Answer the questions in column A and Column B by ticking the relevant box relating to column 1

<table>
<thead>
<tr>
<th>Column 1</th>
<th>A</th>
<th>B</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>What did the project hope to achieve with the funding from the Partnership fund</td>
<td>Which of these aims has the project met to date</td>
</tr>
<tr>
<td></td>
<td>Tick all that apply</td>
<td>Tick all that apply</td>
</tr>
<tr>
<td>Increased awareness of benefit eligibility</td>
<td>Go to Q15</td>
<td></td>
</tr>
<tr>
<td>Increase take up of benefits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase / enhance older people’s access to wider services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase/ enhance advice services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase/ enhance outreach work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase/ enhance face-to-face contact</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase/ enhance partnership working</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No plans at beginning</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Do you expect that the project will meet its aims by the time the funding ends?  

Tick one box

- Will meet some aims ........................................................... Go to Q16
- Will meet most aims ........................................................... Go to Q16
- Will meet all aims ............................................................ Go to Q17
- Will meet none ................................................................ Go to Q16

What will prevent the project from meeting all of its aims?  

Tick all boxes that apply

- Insufficient funding ............................................................. Go to Q17
- Insufficient staff available .................................................... Go to Q17
- Difficulties engaging customers ........................................... Go to Q17
- Other – please specify .......................................................... Go to Q17

The following questions are about staffing of the Partnership Fund Project

Q17a Were any new staff, recruited specifically to work on the Partnership Fund Project?

If the Partnership Fund project has a parent organisation, please include those from new staff from outside the wider parent organisation

Tick one box

- Yes Go to Q17b
- No Go to Q17b

Q17b Did any existing staff, from within the wider parent organisation(s) but previously working in a different role, take on work on the Partnership Fund Project?

Tick one box

- Yes Go to Q17c
- No Go to Q18

Q17c How many existing staff took on a new role to work on the Partnership Fund Project?

Write in number ................................................................. Go to Q17d
Now thinking of the first 5 staff who took on a new role to work on the Partnership Fund project.

Q17d In order to work on the Partnership Fund Project, in addition to the work on the Partnership Fund did he/she …

1. Continue in previous role as before
2. Continue in previous role in reduced capacity
3. Relinquish previous role completely

Go to Q17e

Q17e Including hours worked on the Partnership Fund Project, did the number of hours he/she worked for the wider parent organisation overall, increase, decrease or stay the same?

1. Increased hours worked
2. Decreased hours worked
3. Stayed the same

Go to Q18

Q18 The next questions are about the staff who work on the Partnership Fund Project. Please remember to answer with regard only to the paid staff and volunteers who make up the Partnership Fund Project team. Exclude any staff who only work as a partner or refer customers to the Partnership Fund project within the parent organisation.

<table>
<thead>
<tr>
<th>Record details of paid staff in column A and volunteers in column B</th>
<th>A</th>
<th>B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q18a</td>
<td>On average, how many paid staff and/or volunteers would usually work on the Partnership Fund project? That is, the paid staff and volunteers who would make up the Partnership Fund project team?</td>
<td>Go to Q18b</td>
</tr>
<tr>
<td>Q18b</td>
<td>On average, how many of these paid staff and/or volunteers would be in direct contact with customers?</td>
<td>Go to Q18c</td>
</tr>
<tr>
<td>Q18c</td>
<td>Has the number of paid staff and/or volunteers working on the project at any one time changed over the course of the project?</td>
<td>Tick one box only</td>
</tr>
<tr>
<td>Yes – increased</td>
<td>Go to Q18d</td>
<td>Go to Q18d</td>
</tr>
<tr>
<td>Yes – decreased</td>
<td>Go to Q18d</td>
<td>Go to Q18d</td>
</tr>
<tr>
<td>Yes – both increased and decreased</td>
<td>Go to Q18d</td>
<td>Go to Q18d</td>
</tr>
</tbody>
</table>
### Q18d
What is the main reason that the number of paid staff and/or volunteers has changed on the project? WRITE IN

### Q18e
Which roles do paid staff undertake in the Partnership Fund Project? Are there...

<table>
<thead>
<tr>
<th>Role</th>
<th>Go to Q18f</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organisational director/managers</td>
<td>Go to Q18f</td>
</tr>
<tr>
<td>Management committee members</td>
<td>Go to Q18f</td>
</tr>
<tr>
<td>Project managers</td>
<td>Go to Q18f</td>
</tr>
<tr>
<td>Project workers - including benefits advisers</td>
<td>Go to Q18f</td>
</tr>
<tr>
<td>Admin workers</td>
<td>Go to Q18f</td>
</tr>
<tr>
<td>Other – please specify</td>
<td></td>
</tr>
</tbody>
</table>

### Q18f
Have the type of roles adopted on the project changed over the course of the project? Have these roles changed...

<table>
<thead>
<tr>
<th>Change Method</th>
<th>Go to Q19</th>
</tr>
</thead>
<tbody>
<tr>
<td>among existing staff</td>
<td>Go to Q19</td>
</tr>
<tr>
<td>by increasing staff</td>
<td>Go to Q19</td>
</tr>
<tr>
<td>by decreasing staff</td>
<td>Go to Q19</td>
</tr>
<tr>
<td>Roles not changed</td>
<td>Go to Q19</td>
</tr>
</tbody>
</table>

### Continuing with the Partnership Fund project after funding ends

**Q19** Is it intended to continue with the work the partnership fund project has been conducting after the partnership funding ends?

<table>
<thead>
<tr>
<th>Option</th>
<th>Go to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Q20</td>
</tr>
<tr>
<td>No</td>
<td>Q20</td>
</tr>
<tr>
<td>Unsure</td>
<td>Q20</td>
</tr>
</tbody>
</table>
Q20 Why will / might you not continue with the work?

Tick all boxes that apply

Will not be possible without funding or funding unavailable elsewhere  

Operational problems running the project  

Difficulties identifying and helping providing service to the customers  

No longer need for project  

Other – please specify

END

Thank you for completing the Information Sheet

Please retain the completed Information Sheet for the telephone interview.

If you will not be taking part in the telephone interview yourself please pass the completed Information Sheet to the person who will be taking part in the interview. This person should be able to give us information about how your Partnership Fund project operates and the services it offers to older people.

THANK YOU
Reminder letter

Dear

RE: Partnership Fund Evaluation

As you will be aware the Department for Work and Pensions commissioned independent researchers, the National Centre for Social Research (NatCen), to undertake an evaluation of initiatives funded by the Partnership Fund. The evaluation comprises of two distinct components. One component will be a general survey of all 172 projects operating within the Partnership Fund. The survey will cover questions concerning the activities undertaken by projects and outcomes achieved. This is scheduled to happen in the Spring or Summer of 2006.

I have recently been in contact with the contractors of the project (NatCen) who provided me with an update on the current status of the evaluation.

NatCen who will be administering the survey element of the evaluation have been in touch with you to try to arrange a time convenient with you to carry out a telephone interview. Unfortunately, it has not been possible for you to commit to taking part. Our aim is to complete a telephone interview with all 172 Partnership Funded projects therefore your cooperation will be much appreciated. As a part of the funding contract set up between [name] and The Partnership Fund team you were informed that ‘where requested, co-operation with external evaluators reviewing the wider social impact/impacts of The Pension Service Partnership Fund’ is a requirement (Schedule 2 point 1.1.6).

It is the evaluators’ aim to minimise the burden on your time. The research will be conducted at times and locations most suitable to you, your staff and customers. I would like to reassure you that information gathered during the evaluation will remain confidential. Individual projects, their staff and customers will not be identifiable in the final report. All data will be handled and stored in accordance with the Data Protection Act.

We very much hope that you are able to participate in this element of the evaluation, the outcomes of which will be twofold. First, participation will enable us provide you with some detailed insight into and feedback about your practice. Second, results from the evaluation will feed into a good practice guide which will aim to ensure that elderly people continue to have access to the benefits and services to which they are entitled and require.

The researchers at NatCen will be able to help you if you have any questions regarding the research.

However, if you have any further questions or would like to discuss any of the above with me please feel free to get in touch.

Yours sincerely

Vicky Petrie
Senior Research Officer
Appendix B
Qualitative recruitment documents
Confirmation letter – staff

Dear [Name],

NatCen Interview for Partnership Fund Evaluation

Thank you for agreeing to participate in the evaluation of the Partnership Fund, the results of which will be used to promote good practice standards that ensure older people receive the benefits to which they are entitled and the services they need.

Further to our recent telephone conversation, I am writing to confirm the time, date and location for your interview with a researcher from NatCen.

Your interview will take place:
at [insert location]  
on [insert time and date]

The NatCen researcher(s) will be [insert researcher(s) name(s)].

As discussed, the interview will last for approximately one hour and will be recorded on tape. Everything that you tell the interviewer will be in confidence. No personal information will be passed to anyone outside the research team. This includes customers and staff from your Partnership Fund project, your organisation, the Department for Work and Pensions or any other Government Department. We will write a report of the study but no individual will be identified in the published results of the research.

Thank you once again for agreeing to participate in the research, we very much look forward to meeting you. If you have any questions about the evaluation, please do call me [insert researcher’s phone number] or email me at [insert researcher’s email address]. Alternatively, you may wish to contact Vicky Petrie at DWP on 020 7962 8555 or at Vicky.Petrie@dwp.gsi.gov.uk.

Yours sincerely

[insert researcher’s name]
What if I have other questions?

If you have any other questions, please feel free to speak to:

[insert name of lead researcher]
Email: [insert address of lead researcher]
Freephone: [insert freephone number]

Evaluation of The Pension Service Partnership Fund

Research with Partnership Fund Project Delivery Staff

The National Centre for Social Research (NatCen) is the largest independent social research institute in Britain. We design, carry out, and analyse, research studies in the fields of social and public policy.

This leaflet is also available in large print, braille or tape.

NatCen are leading this research, exploring your experience of delivering your Partnership Fund project.

This leaflet provides you with further information about the study.
What is the aim of this research?

As you will be aware, the Department for Work and Pensions and the Department for Environment, Food and Rural Affairs jointly fund The Partnership Fund. This is a programme of projects across England, Wales and Scotland, whose primary aim is to encourage older people of pension age and above to claim the benefits to which they are entitled and access the services they require.

The DWP has commissioned NatCen to conduct research exploring the experience of setting up and delivering Partnership Fund projects on their behalf. The research will be used to develop a good practice guide that will aim to ensure older people continue to have access to relevant benefits and services. This guide will be disseminated widely across voluntary, community and local and central government organisations.

What is involved?

We will conduct interviews with staff, customers and partners of your scheme in order to gain insight into how services are delivered to and received by older people. We will also visit you to see the project in action. This will help us to learn about good practice so that it may be passed on to others who are responsible for delivering services to older people.

We will be speaking to staff from a range of Partnership Fund projects across Great Britain.

What is required of me?

Interviews will involve a researcher talking to you for about one hour. We will, of course, work around your busy schedule to arrange a venue and time convenient to you for this interview.

Interviews at your project will be taking place in [insert evaluation timings here].

We will ask you to talk about your experiences in setting up and delivering your project, specifically:

- The nature and aims of your project and the services you offer;
- Your role in delivering the project;
- Your perspectives of the successes and difficulties in setting up your project;
- The needs of clients who use your service and your experiences of working with them;
- Your experiences of working with partners to deliver your project.

Is it confidential?

Yes. Everything that you tell the interviewer will be in confidence. No personal information will be passed to anyone outside the research team. This includes customers and staff from your Partnership Fund project, your organisation, the Department for Work and Pensions or any other Government Department. We will write a report of the study but no individual will be identified in the published results of the research.

Our responsibilities to you:

- We guard your privacy: your participation will be treated in strict confidence in accordance with the Data Protection Act. Your contribution will be used for research purposes only. Nobody will be individually identified in the final report.
- We respect your wishes: participation in the study is voluntary and you are not obliged to answer any questions you do not wish to.
- We answer your questions: we will be happy to answer any questions you may have about the research.
Confirmation letter – partners

Dear

NatCen Interview for Partnership Fund Evaluation

Thank you for agreeing to participate in the evaluation of the Partnership Fund. This research is being conducted by NatCen, an independent social research organisation, on behalf of the Department for Work and Pensions. The results of this research will be used to promote good practice standards that ensure older people receive the benefits to which they are entitled and the services they need.

Further to our recent telephone conversation, I am writing to confirm the time, date and location for your interview with a researcher from NatCen.

Your interview will take place:
at [insert location]
on [insert time and date]

The NatCen researcher(s) will be [insert researcher(s) name(s)].

The interview will last for approximately one hour and will be recorded on tape. Everything that you tell the interviewer will be in confidence. No personal information will be passed to anyone outside the research team. This includes customers and staff from the Partnership Fund project, your organisation, the Department for Work and Pensions or any other Government Department. We will write a report of the study but no individual will be identified in the published results of the research.

Thank you once again for agreeing to participate in the research, we very much look forward to meeting you. If you have any questions about the evaluation, please do call me [insert researcher’s phone number] or email me at [insert researcher’s email address].

Yours sincerely

[insert researcher’s name]
Instructions for staff for recruiting customers

Evaluation of The Pension Service Partnership Fund

Interviews with customers

Thank you for agreeing to help us to identify and contact customers who use your service as part of our research with [insert project name] for the wider evaluation of The Partnership Fund.

We would like to speak to 5 customers of your initiative. Some of the people who are contacted about the research will choose not to participate therefore we would like to ask you to select 20 who will be given further information. We will also want to speak to different types of customers and we have outlined the characteristics we are interested in below. We are aware that customers place great trust in members of staff at your initiative and do not wish customers to feel obliged to take part in the research because of this. If customers consent to participate, we would prefer a researcher from NatCen to contact them directly about their involvement in the research, at which point they will be given a further opportunity to withdraw. Because we will hopefully have more people than we need to interview, and the final selection of customers will be ours, this guarantees customers a certain degree of anonymity.

In order that NatCen complies with the Data Protection Act, the process we have devised for contacting customers of your initiative comprises several stages. These are outlined in detail below. We have endeavoured to make the process as simple as possible and to minimise the burden of work for you. If, however, you have any questions at any point during this process, please do contact [insert project contact] at NatCen who will be able to help.

We realise that this process will take time and effort on your part therefore we are offering you an honorarium of £200. Please advise us to whom a cheque should be made payable and we will forward this to you as soon as possible.

Step 1

The first thing we would like you to do is to select 20 customers who currently use or have recently used your service. In order that we can speak to a range of customers who have come into contact with your initiative, we have outlined below a description of the different characteristics we would like you to include:

• a roughly equal number of men and women;

• people who are married and people who are single/widowed/divorced;

• people of different ages (all should be 60 or over);

• people who have contacted your project for different reasons;

• people who have had only one contact with you and people who have had several contacts.
You may have a database of customers from which you can make this selection or you may choose to target some new customers of your initiative. Ideally, your selection of 20 customers would include people from both.

If your project sees relatively few people, you may need to make this selection of customers over some period of time. We would suggest, however, that you do not wait until you have selected all 20 before progressing them to the next steps of the process. We are happy to receive customer details in stages.

**Step 2**

Next, we would like you to provide these customers with information about the research we are undertaking and ask for their consent for a) you to share their contact and other details with us, and b) for their permission to be approached by us to participate in the research.

We have put together a ‘pack’ which you should give (either face-to-face or by post) to each customer. This pack includes the following:

- a letter from you introducing NatCen and underlining the importance of the research (we have drafted this letter and will provide you with an electronic copy to be printed on your notepaper);
- a leaflet explaining the research and the consent process;
- a consent form asking for permission to pass specified details on to NatCen and for permission for NatCen to contact the customer to invite them to participate in the research (again, we will provide you with an electronic copy to be printed on your notepaper);
- a postage-paid envelope addressed to you at [insert project name].

**Step 3**

Customers will be able to read the documents contained in the pack and decide whether or not they are willing a) for you to pass their contact details and the other details outlined in the consent form to NatCen, and b) for NatCen to approach them about participating in the research.

At this stage, the researchers at NatCen will not know the name, contact details or characteristics of any of the customers identified and sent a recruitment pack by you.
‘Customer recruitment pack’

Step 4

Customers who do not consent...

If the customer does not wish for their contact and other details to be passed to NatCen and they are not interested in taking part, they will receive no further contact about the research. Their details will not be passed to NatCen and NatCen will not know that this customer was contacted by your initiative.

Customers who do consent...

If a customer does consent to the above, they will fill in the consent form and return it to you in the pre-paid envelope. When you have received this form from the customer, you will be able to pass the contact and other details of that customer on to NatCen. A researcher at NatCen may then approach that customer to invite them to participate in the research directly. If the customer would like to take part, the researcher will arrange to interview them, at a time and in a location convenient for them.

Interviews with customers will be with either [insert names of allocated researchers] who are working on this research project. Researchers will carry identification with them to all interview appointments.

Further information

NatCen has set up a freephone number on which customers may contact a researcher if they have any questions or concerns about the research at any time. This freephone number is included in the leaflet in the recruitment pack and will be included in any further correspondence with customers should they consent to participate in the research.

Customers may, at any time, change their mind about participating in this research study and may contact you at [insert project name] or a NatCen researcher via the freephone number to indicate this. Should any customer contact you directly to indicate that they no longer wish to participate, we would be grateful if you would let us know as soon as you are able.

If you have any queries about any aspect of this process, please contact, in the first instance, [insert allocated lead researcher name] at [email] or on [insert telephone number] who will be able to help.

Alternatively, you may contact [insert allocated researcher name] at [email] or on [insert telephone number].
‘Customer recruitment pack’

Dear

[insert project name] Research

We are writing to tell you about an important study about customer experiences of [insert project name]. The study is being conducted by NatCen, an independent social research organisation, on behalf of The Department for Work and Pensions.

We have enclosed some more information about the research study that NatCen are conducting. We would be grateful if you would read this information and consider whether or not you would like to take part. Participation in the study is entirely voluntary and you do not have to take part if you do not wish to.

If you would like to take part in the research, we would be very grateful if you would read and sign the enclosed consent form. When you have done this, please return the consent form to [insert project name] in the stamped addressed envelope provided. This form gives your permission for [insert project name] to pass your contact details and the other information listed on the consent form to NatCen. Having this information about you will ensure NatCen can speak with a wide range of people with different needs and who are of all ages and ethnic background.

Thank you very much indeed for your help.

Yours sincerely,

[insert project contact name]
Research Study: customers’ experiences of [insert project name]

CONSENT FORM

I have read/had read to me the Customers’ experiences of [insert project name] leaflet and I understand what is being asked of me.

I agree for [insert project name] to give NatCen the following information about me:

- Age
- Gender
- Ethnic background
- Marital status
- Full details of my involvement with [insert project name] (such as date started, help received, etc.)
- Contact details (name, address, telephone number)

I understand that this information will be securely stored in accordance with the Data Protection Act, will not shared with anyone else, and will be used only for the purposes of this research study.

I also agree to give NatCen permission to contact me, if they so wish, to tell me more about the research and invite me to participate.

I understand that I can change my mind about this at any time without having to provide a reason.

Name (please print) ____________________________

Signature ____________________________________

Date ________________________________________
The National Centre for Social Research (NatCen) is the largest independent social research institute in Britain. We design, carry out, and analyse, research studies in the fields of social and public policy.

The Research Team:
William O'Connor
Rosalind Tennant
Stephen Webster
Meg Callanan

National Centre for Social Research
35 Northampton Square
London EC1V OAX
Tel: +44 (0)20 7250 1866
Fax: +44 (0)20 7250 1524
Web: www.natcen.ac.uk

Evaluation of The Pension Service Partnership Fund

Our responsibilities to you:

- We ensure your safety: all our researchers carry photographic identification.

- We guard your privacy: your participation will be treated in strict confidence in accordance with the Data Protection Act. Your contribution will be used for research purposes only. Nobody will be individually identified in the final report.

- We respect your wishes: participation in the study is voluntary and you are not obliged to answer any questions you do not wish to.

- We answer your questions: we will be happy to answer any questions you may have about the research.

Research study: customers' experiences of [insert project name]

Commissioned by
Department for Work and Pensions

NatCen are leading this research, exploring your experience of receiving the services of [insert project name]

This leaflet provides you with further information about the study.

It is also available in large print, braille or tape.
What is the aim of this research?

We are asking for your help with important research about customers’ experiences of [insert project name].

The Department for Work and Pensions and the Department for Environment, Food and Rural Affairs jointly fund [insert project name]. It is one of a number of projects across England, Wales and Scotland whose aim is to encourage older people of pension age and above to claim the benefits to which they are entitled and access the services they require.

What is involved?
The DWP are interested in finding out the experiences of customers who have used [insert project name] and they have commissioned NatCen to conduct interviews with people about their experiences. Your views will help us to improve the way information and services are provided to older people.

Interviews will involve a researcher talking to you for about one hour. The interview will be recorded so that we can be sure that we correctly remember everything that you tell us. We will work around you to arrange a venue and time convenient to you for this interview.

We will be conducting this research in [insert project evaluation timing].

What will I be asked?

We will ask you to talk about the following broad topics:

• Your individual circumstances and experiences of accessing benefits and services for older people;
• Your experiences of using [insert project name];
• Whether [insert project name] has helped you or not.

Do I have to take part?

No. We are relying on your voluntary co-operation. No one is taking part in this study who does not want to. Even if you say yes to begin with, you are free to withdraw at any time.

If you do decide to take part in the interview, we will give you £20 to compensate you for your time.

What happens now?

If you wish to take part in the research, please complete the attached consent form and return it to [insert project name] in the reply paid envelope. Having this information about you will enable us to ensure that we can speak with a wide range of people with different needs and who are of all ages and ethnic background. It will also enable us to contact you directly.

What if I have other questions?

If you have any other questions, we would be happy to answer them. Please contact:

[insert researcher name]
Email: [insert email address]
Freephone: [insert freephone number]

Is it confidential?

Yes. Everything that you tell the interviewer will be in confidence. No personal information will be passed to anyone outside the research team. This includes staff from [insert project name], the Department for Work and Pensions or any other Government department. We will write a report of the study but no individual will be identifiable from the published results of the research.
Letter to customers from NatCen (post-consent to share contact details)

Hello

[insert project name] Research

Thank you for agreeing for your details to be passed to us so we may contact you. We are writing to ask if you would be prepared to help us with an important study about customer experiences of [insert project name]. The Department for Work and Pensions [insert if relevant: and the Department of Environment, Food and Rural Affairs] jointly fund [insert project name] which aims to encourage older people of pension age and above to claim the benefits to which they are entitled and access the services they require.

The aim of the research is to find out what customers like you think about the service and to find out more about your experiences of using it. Your views will help us to improve the way information and services are provided to older people. The attached leaflet has a lot more information about the research and what would be involved in taking part. We would ask that you read it before making any decision about participating.

Thank you very much indeed for your help. We will contact you again soon to talk some more about this and ask for your consent to take part in the research. In the meantime, if you have any queries at all about the study, please contact us on our freephone number [insert freephone number].

Yours sincerely

[insert lead researcher name]
Staff observation guidelines

Evaluation of The Pension Service Partnership Fund

Observations of staff-customer interactions

Briefing note for participating projects

Thank you for agreeing for NatCen to observe [insert project name]’s project activity as part of the wider evaluation of The Partnership Fund. The aim of the observations is to witness your project in action in order to identify good practice in engaging older people in services that aim to help them.

As you may be aware, the evaluation has already included some interviews with staff, partners and customers of your project. This element of the evaluation will comprise observation of your project in order that we gain a complete picture of your project in action. Generally this will involve us sitting in on but not participating in a meeting or some other encounter with a customer. In addition, if possible, we would like to conduct a short interview (no more than five minutes in length) with each customer and staff member we observe about their perceptions and experiences of the interaction. Our plan is to spend two half-days with your project. We will want to discuss and agree with you what aspects of your project activities we could feasibly observe, and when it would be best to come and visit you.

A NatCen researcher will conduct all observations. The aim is to see the project in action. At no point will we be intervening or interfering with your work.

We will make notes throughout each observation that will form part of the evidence we use to evaluate the Partnership Fund. Post-observation interviews will not be tape-recorded but detailed case notes will be taken.

In order that NatCen complies with guidelines relating to the ethical conduct of social research, we have outlined the various stages of the set-up and conduct of the observation exercise, highlighting points at which it will be important to ensure the customer is informed about the research study and has consented to participation in it. In addition, for any observations we conduct, we will be guided by your judgement of whether or not you feel it is appropriate for a researcher to observe a given interaction.

The stages of the observation activity are outlined in detail below.

Step 1 – Deciding which activities to observe

First of all, we would like your help in selecting suitable activities where staff work directly with customers for us to observe. From our conversations with you so far, we understand that your project conducts a variety of activities. We would be very interested in observing [one or more] of the following activity/activities [delete as appropriate]:

Appendices – Qualitative recruitment documents
• A ‘drop-in’ advice service encounter
• Advice provided via a telephone information line
• A pre-arranged advice session held in your offices
• A pre-arranged advice session held in the customer’s home
• A pre-arranged advice session held in another location

We fully understand that it will be more or less feasible to conduct observations in these different settings and will want to discuss with you your views about what would be most appropriate for your client group.

Our aim will be to cause minimal impact to your work by our presence. Therefore, once we have agreed with you the activities we will observe, we will want to discuss with you any practical considerations we should take into account, such as the meeting environment, staff/customer access needs and so forth.

**Step 2 – Getting staff agreement to our observation activities**

It is likely that we will have met with the staff delivering Partnership Fund activities already in our contact with the project. However, we will want to make sure that they are happy for their work to be observed. You will of course want to explain the role of the research to your own staff. We would ask that you make clear to them that participation is voluntary. In addition, we are happy to talk to individual staff members to reassure them about the purpose of the observations, the role that we will play as researchers and how the data will be used.

**Step 3 – Giving customers information about our observation activities**

It is important that all customers who participate in an observation exercise do so voluntarily and with a good understanding of the research study and their role within it. Our aim is to capture your project’s interaction with a variety of different types of customer. Although we are aware that this might be difficult to determine or arrange. We will be guided by staff in your project in selecting suitable customers to approach about participating in the study.

Prior to the conduct of any observation, it will be important that customers are adequately informed of the research study, its nature and purpose, and of the potential that their interaction with the project could be observed and that we may want to conduct a post-observation interview. We have designed a leaflet specifically for this purpose, which contains the key points in accessible language.

The setting of the observation will determine how you can best communicate this to customers.

*Where we wish to observe a pre arranged meeting*, for example a visit of the customer to the office or of a project worker to a customer’s home, we ask that you provide the customer, in advance, with a description of the aims of the study, the purpose of the observation and what it would involve.
Where we plan to observe more ad-hoc activities such as drop-in sessions or telephone help-line activity, it will not always be possible to provide the customer with information about the study in advance. This may mean that observation is inappropriate in these circumstances. We will want to hear your views about this. However, if you think it is suitable, we would ask the relevant staff member to give information about the research to the customer at the first available opportunity.

For observations taking place at ‘public’ events, for example a drop-in event or an advice road-show, it may be possible to publicise the observation exercise in advance.

**Step 4 – Getting consent from customers**

Verbal consent to participate must be obtained from all customers prior to their participation in an observation and post-observation interview.

For pre-arranged interactions, we ask that the relevant member of your staff should gain the customer’s verbal consent for the presence of a NatCen researcher to observe the encounter or activity in advance, preferably when the appointment is booked. Consent should be checked again by the project worker at the start of the appointment or meeting.

For ad-hoc encounters, it will not be possible to obtain consent prior to the staff-customer interaction. In this situation, customer consent to have their interaction with the project observed should be obtained by the project worker at the earliest opportunity and certainly prior to any direct involvement of the NatCen researcher.

Only once the information has been given to the customer, and they have given their consent to their interaction with the worker being observed, will a NatCen researcher become involved.

Customers may change their mind at any time about taking part in an observation without having to give a reason. Where this occurs, the NatCen researcher will either not attend (if they know about it in advance) or leave the appointment immediately (if already in attendance).

**Step 5 – Getting consent for post-observation interviews**

At the end of the observed encounter, the NatCen researcher will ask for verbal consent from the customer and staff worker to participate in a five-minute post-observation interview. These interviews will aim to understand the customer’s and staff worker’s perceptions and experiences of the encounter. We will, again, be guided by you as to whether or not individual customers should be approached about participating in an interview following an observation involving them.

Where the meeting is taking place in a public or office environment, the NatCen researcher will locate a safe and secure location for the post-observation interview to take place. We will want to discuss possible venues for these interviews with you or your staff prior to the observation event.
Where the meeting is taking place at a customer’s home, we realise that it may not be possible or appropriate to conduct post observation interviews. We are aware that it will seem strange or odd to some older people. We will want to be guided by you about this. If it were possible we would hope to spend a few minutes with the customer, preferably out of earshot of the project worker, to ask them their views about the experience.

**Further information**

NatCen has set up a freephone number on which customers may contact a researcher if they have any questions or concerns about the research at any time. This freephone number will be included in the leaflet we ask you to give to customers prior to an observation.

As stated above, customers may, at any time, change their mind about participating in this research study and may contact you or your staff, or a NatCen researcher via the freephone number to indicate this. Should any customer contact you directly to indicate that they no longer wish to participate in an observation, we would be grateful if you would let us know as soon as you are able.

If you have any queries about any aspect of this process, please contact, in the first instance, [insert allocated lead researcher name] at [email] or on [insert telephone number] who will be able to help.

Alternatively, you may contact [insert allocated researcher name] at [email] or on [insert telephone number].
The National Centre for Social Research (NatCen) is the largest independent social research institute in Britain. We design, carry out, and analyse research studies in the fields of social and public policy.

The Research Team:

William O'Connor
Rosalind Tennant
Stephen Webster
Meg Callanan

National Centre for Social Research
35 Northampton Square
London EC1V 0AX
Tel: +44 (0)20 7250 1866
Fax: +44 (0)20 7250 1524
Web: www.natcen.ac.uk

Evaluation of The Pension Service Partnership Fund

Our responsibilities to you:

- We ensure your safety: all our researchers carry photographic identification.

- We guard your privacy: your participation will be treated in strict confidence in accordance with the Data Protection Act. Your contribution will be used for research purposes only. Nobody will be individually identified in the final report.

- We respect your wishes: participation in the study is voluntary and you are not obliged to answer any questions you do not wish to.

- We answer your questions: we will be happy to answer any questions you may have about the research.

Research with customers of [insert name of service]

Commissioned by
DWP Department for Work and Pensions

NatCen are leading this research, exploring your experience of receiving the services of [insert name of service]

This leaflet provides you with further information about the study.

It is also available in large print, braille or tape.
What is the aim of this research?
We are asking for your help with important research about customers’ experiences of [insert name of service].

The Department for Work and Pensions funds [insert name of service]. It is one of a number of projects across England, Wales and Scotland whose aim is to encourage older people of pension age and above to claim the benefits to which they are entitled and access the services they require.

What is involved?
The DWP are interested in finding out the experiences of customers who have used [insert name of service]. They have commissioned NatCen to carry out observations of the [insert name of service] in order to learn more about how it works. NatCen will then briefly discuss with people their experiences of the meeting. Your views will help us to improve the way information and services are provided to older people.

The observation will involve a researcher sitting in on, but not participating in, a meeting you have with [insert name of service]. Afterwards we would like to conduct a short five-minute interview with you about your experiences of this meeting.

We will be conducting this research in [insert dates].

What will I be asked?
The researcher will not participate in any way during your meeting with [insert name of service]. In the brief interview following your meeting we will ask you to talk about the following topics:

- What parts of the meeting you thought went well;
- Whether you feel your needs have been met by your meeting;
- How this service compare to your experiences of other benefits services;
- Whether there is anything you feel could be done differently in the future to help other people like you.

Do I have to take part?
No. We are relying on your voluntary cooperation. No one is taking part in this study who does not want to. Even if you say yes to begin with, you are free to withdraw at any time.

If, once your meeting with [insert name of service] has started, you decide you do not want it to be observed, the researcher will leave the meeting immediately.

Is it confidential?
Yes. Everything that you say during your meeting and tell the researcher afterwards will be in confidence. No personal information will be passed to anyone outside the research team. This includes staff from [insert name of service], the Department for Work and Pensions or any other Government department. We will write a report of the study but no individual will be identifiable from the published results of the research.

What happens now?
If you wish to take part in the research and haven’t done so already, please tell the member of staff you spoke to from [insert name of service]. They will then arrange for the researcher to be present at your forthcoming meeting.

What if I have other questions?
If you have any other questions, we would be happy to answer them. Please contact:

[insert researcher name]
Email: [insert email address]
Freephone: [insert freephone number]
Appendic C
Qualitative fieldwork documents

Partnership Fund Evaluation

Topic guide - STAFF

Research Objectives

The Partnership Fund evaluation has the broad aims of exploring the projects funded by the scheme by gathering a variety of stakeholder perspectives in order to offer insights into best practice for delivering services and benefits to older people.

Interviews with staff will specifically aim to:

- Explore in some detail the nature of lead Partnership Fund projects
- Understand the Partnership Fund initiative: staff roles, the services offered, the client focus and how they make use of the service offered
- Examine key issues in set up and operation of PF funded initiatives;
- Identify and understand the nature of ‘partnership working’ in the initiative;
- Gain perspectives of the key successes of the Partnership Fund initiative and draw out best practice for delivering services and benefits to older people.
1. **Introduction**  
*Aim: to introduce the discussion and NatCen.*  
- Introduce self, NatCen  
- Introduce research: see research objectives above  
- Explain recording, length (about an hour and a half) and nature of discussion (specific topics to address, but conversational in style), reporting and data storage issues  
- Explain confidentiality  
  - Report will not identify individuals or initiatives by name  
  - Comments will not be ascribed to individuals  
  - Unique nature of initiatives may, however, mean that projects may be recognisable to people who know the initiative well. Similarly, where staff members perform a unique role within an initiative, individuals may be recognisable to people who are very familiar with a particular initiative.  
- Any questions  

*Note: If the staff member participated in the telephone screening exercise, it may not be necessary to go through the issues contained in 2, 3 and 4 that were covered in that screening interview. The content of these sections should therefore be amended by the researcher as appropriate.*

2. **Participant background**  
*Aim: to introduce participant and set the context for proceeding discussion.*  
- Current position/job title, nature of role, responsibilities  
- Time in current position  
- Pathway into current position  
- Experience/history of working with older people

3. **Organisation background**  
*Aim: to understand the organisational context of the PF initiative*  
- Brief overview of organisation  
- Objectives / mission  
- Services offered  
- Client focus  
- Main funders  
- Fit with local service context
• explore uniqueness of service offered and overall contribution to local service
• Nature of partnership working (apart from PF funded initiative)
• definitions of partnership working
• names and brief description of partner organisations
• nature of relationship with identified partners
• Key issues for providing services to older people in area

4. General views and knowledge of the Partnership Fund
Aim: to explore understanding of the partnership fund and the application process
• How found out about PF
• Why applied for PF funding (vs. other)
• Perceived purpose of PF probe for discussion of partnership working, increasing take-up of benefits and services
• Explore application/tendering process
  • Reflections on process
  • Adequacy of guidance
  • Level of experience of seeking funding (individual and organisation)

5. Overview of Partnership Fund initiative
Aim: to understand the nature and aims of the specific PF initiative.
• Aim and objectives of initiative
• Implementation history
  • how/when established
  • extent to which established now (what stage of development is project at)
  • challenges for project set up – how overcome, any residual effects for project service provision
• Who involved in partnership (probe for mentions of relationship with The Pension Service Local Service)
  • New or existing partnership
  • If existing, explore what PF added to relationship
  • If new, motivations for partnering PF project
  • Factors underpinning choice of partners
  • Arrangements for working together

Appendices – Qualitative fieldwork documents
• Main project activities
  • services offered
  • geographical coverage
  • Distinctiveness of activities to those pursued by parent organisation
  • Working relationships with parent organisation

6. Definition of client group

Aim: to understand nature of the PF initiative’s client group and the range of needs and issues they present.

• Nature of client focus/priorities for the initiative
  • who included and excluded (parameters of initiative scope)
  • factors governing client focus
  • explore similarities/difference with client group of parent organisation and reasons for
• Key needs/issues presented by target group
• Whether/how needs/issues vary between individual clients or by types of client

7. Client targeting and engagement

Aim: to explore how clients are identified by the initiative, how they come into contact with it

• Examine how prospective clients are identified
  • Direct Targeting (how, data sharing / access arrangement)
  • Opportunistic (how is this organised)
  • Opportunities for self selection by older person
  • Other ways of identifying clients
• Explore the ways by which the initiative aims to engage the client group
  • how – strategies, access routes, contact channels
  • why – issues triggering contact
  • directness (explicitly about benefits or as part of other service)
  • Involvement of identified partners / other local services in facilitating client engagement with PF initiative
• similarities/differences of engagement strategies across target group
• How do clients access information about the initiative
  • nature of information available
  • how/where clients should come across it
• What reasons do clients offer for using the service
  • Is this what the initiative intended
• Perceived effectiveness of engagement strategies
  • barriers/facilitators to client engagement with service
  • what difference has PF initiative made to engaging with older people

8. Addressing client needs

Aim: to understand how clients proceed through service and how their needs are met, including facilitation of their access to benefits and services.

Ask staff respondent to describe how clients might experience the service. If it helps, ask them to describe a simple pathway and a more complex one.

Explore:
  • type of client involved – characteristics, needs, issues
  • stages of process
  • aspects of service used
  • length of relationship with project (including number of contacts)
  • any internal referral (to other aspects of PF initiative or other services provided by parent organisation)
  • any external referral (to identified partners, to other local services)
  • Explore how initiative meets user needs
    • probe for features of activities, staff approach and characteristics, partnership working, service scope / focus
  • What distinctive about PF project vs. other, similar services (provided by wider organisation or within local area)

9. Outcomes of PF

Aim: to gather perspectives of the key successes of and learning from the individual PF project, including the range of outcomes from the PF project for clients, staff and the wider organisation.

Note: projects will be at different stages in their implementation and activity. It will be important to contextualise discussions of outcome according to the length of time projects have been in operation.

• How PF initiative has impacted upon service provided
  • How deal with clients
  • What organisation is enabled to do
    • probe for changing practices, broader service scope, changes to client group
• Other impacts

• Explore range of outcomes from PF initiative for:
  • clients of the initiative
    • probe specifically for impacts on take up of benefits and access to services
      explore differences by client group, nature of client need, aspect of service accessed
  • staff delivering the initiative
    • probe for issues around skills development, expertise gained, identifying and sharing good practice, particularly relating to overcoming barriers to benefit take-up
  • organisations involved in the initiative
    • (deal with own organisation first, then the others outlined earlier, including the PF lead organisation)
  • the nature and type of services available for/targeted at older people in the area
    • probe for appraisal of importance of PF initiative's contribution to OP services in local area
  • the quality of partnership working between organisations working with older people in area
    • whether services are more joined up as a result of the partnership fund initiative
    • what inhibits/facilitates achievement of effective partnership working
  • any unanticipated outcomes (how/why emerged)

• Explore how all outcomes discussed relate to objectives of initiative as outlined earlier
  • any barriers to achievement of original objectives
  • what has facilitated meeting objectives

• What has been the value added by PF initiative
  • could the outcomes identified (for client, organisation etc) have been achieved without the PF
  • what would add further value

• Key learnings from PF initiative
  • For each, probe for learning relating to engaging clients, service delivery, identifying and meeting need, partnership working etc.
  • The focus here is on identifying good practice about how to overcome barriers to accessing and the take-up of benefits and services.
  • How can build on any learning identified
• Future plans for PF initiative.

*Probe for any necessary underpinning conditions.*

• for the remainder of the initiative

• when funding for the initiative comes to an end *probe for potential for continuation of service*

• Anything else of relevance not already discussed

End. Thank and close

Note to interviewer: At end of staff interview, discuss following with staff respondent...

1. Explain following stages of qualitative evaluation:
   • users;
   • partners;
   • observations.

2. Advise staff regarding their potential role / involvement in further qualitative stages

3. Seek staff advice for interviewing respondent groups above

4. Seek staff advice regarding what local information to provide to users

5. Establish range of project marketing and publicity literature and collect examples
Partnership Fund Evaluation

Topic guide – PARTNERS

Research objectives
The Partnership Fund evaluation has the broad aims of exploring the projects funded by the scheme by gathering a variety of stakeholder perspectives in order to offer insights into best practice for delivering services and benefits to older people.

Interviews with partners will specifically aim to:

- Explore the nature of partnership generally with the PF lead organisation(s) and specifically that fostered by the Partnership Fund;
- Understand the outcomes arising from involvement in the Partnership Fund initiative (for clients, workers, local organisations and service provision more broadly);
- Capture the learning generated by the Partnership Fund initiative – particularly any good practice that would be useful for organisations that work with or provide services to older people.

1. Introduction
Aim: to introduce the discussion and NatCen.
- Introduce self, NatCen
- Introduce research: see research objectives above
- Explain: confidentiality, recording, length (about an hour) and nature of discussion (specific topics to address, but conversational in style), reporting and data storage issues
- Any questions

2. Participant and organisation background
Aim: to introduce participant and set the context for proceeding discussion.
- Current position/job title, nature of role, responsibilities
- What specific roles/responsibilities in relation to older people
- Brief overview of organisation mission and main activities

3. Nature of partnership with PF project
Aim: to understand the nature of partnership working with the PF project, including how it was established, what it entails and perspectives on how well it is working.
• History of relationship with PF project and how established
  • New or existing partnership
    • How initiated
  • If existing, explore:
    • previous relationship, including successes and problems
    • what PF added to relationship
  • If new, explore:
    • motivations for partnering PF project
    • what helped/hindered establishing partnership

• Partnership construction
  • Which organisations involved
  • What they bring to the partnership
  • Objectives
  • Expectations and roles (including any role in securing funding)

• Explore fully the component parts of the relationship with PF project
  • joint working
  • joint activities
  • referral relationships
    • frequency and reasons for referrals
    • what does either organisation offer that other can’t
  • policy/advocacy work
  • staff development and training
  • other aspects
  • identify which of these is specifically related to the PF funded initiative and which are part of other partnership activities

• Explore other potential opportunities for collaboration and joint working
  • client group (profile, needs presented etc)
  • client engagement or follow-up
  • addressing client need
  • other opportunities
  • views about whether and how any opportunities are exploited
  • what prevents this/what could facilitate it
• Intensity of partnership arrangement
  • Explore how integral or peripheral the partnership is to project activities
  • Whether happy with the current relationship
  • How could/should it be different
• Whether engaged in other partnership arrangements with other organisations
  • How arrangements with PF project compare

4. Outcomes of PF partnership working

Aim: to explore the range of outcomes from partnership working with the PF project has had for older people, the staff and the organisations involved.

Note: projects will be at different stages in their implementation and activity. It will be important to contextualise discussions of outcome according to the length of time projects have been in operation.

• How PF initiative has impacted upon service provided by partner organisation
  • How deal with clients
  • What organisation is enabled to do
    • probe for changing practices, broader service scope, changes to client group
  • Other impacts
• Explore range of outcomes from PF initiative for:
  • clients of the initiative
    • probe specifically for impacts on take up of benefits and access to services
      explore differences by client group, nature of client need, aspect of service accessed
  • staff delivering the initiative
    • probe specifically for issues around skills development, expertise gained, identifying and sharing good practice
  • organisations involved in the initiative
    • (deal with own organisation first, then the others outlined earlier, including the PF lead organisation)
• the nature and type of services available for/targeted at older people in the area
  • probe for appraisal of importance of PF initiative’s contribution to OP services in local area
• the quality of partnership working between organisations working with older people in area
• whether services are more joined up as a result of the partnership fund initiative
• what more could be done
• any unanticipated outcomes (how/why emerged)
• whether any impact on how feel about or willingness to be involved in partnership working
• Explore how all outcomes discussed relate to objectives of partnership as outlined earlier
• any barriers to achievement of original objectives
• what has facilitated meeting objectives
• What has been the value added by PF initiative
• could this have been achieved in any other way
• what would add further value
• Key learnings from PF initiative
  • For each, probe for learning relating to engaging clients, service delivery, identifying and meeting need, partnership working etc.
  • The focus here is on identifying good practice about how to overcome barriers to accessing and the take-up of benefits and services.
  • How can build on any learning identified
• Future plans for PF initiative.
  Prove for any necessary underpinning conditions.
  • for the remainder of the initiative
  • when funding for the initiative comes to an end probe for potential for continuation of service
• Anything else of relevance not already discussed

End. Thank and close
Partnership Fund Evaluation

Topic guide - CUSTOMERS

Research Objectives
The Partnership Fund evaluation has the broad aims of exploring the initiatives funded by the scheme by gathering a variety of stakeholder perspectives in order to offer insights into best practice for delivering services and benefits to older people.

Interviews with customers will specifically aim to:

• Explore the lifestyle, social context and fiscal profile of the individual customer;
• Examine individuals’ pathways into the initiative, their experiences of the process and any outcomes;
• Explore individuals’ needs and examine how and to what extent these were met by the initiatives;
• Explore individuals’ other experiences of benefit / support services in the context of their Partnership Fund interaction;
• Seek the individual’s perspective on what constitutes an effective service and explore any continuing areas of unmet need.

This topic guide addresses all of these issues. However, the level of topic detail will be adapted to the experiences of the individual.

1. Introduction

Aim: to introduce the discussion and NatCen

• Introduce self, NatCen
• Introduce research: see above
• Explain (using copy of customer leaflet if helpful):
  • Confidentiality;
  • Recording;
• Length (about an hour with breaks – however breaks and timings are flexible);
• Nature of discussion (specific topics to address, but conversational in style. Important here to prepare the respondent that interview will cover background details about themselves, as well as their views about and experiences of the initiative);
• Reporting and data storage issues.
• Address any questions
• Check the participant is happy with how the interview is to be conducted where third-party facilitation is being used

**Gain consent**

• Turn on tape and say that need to get their verbal consent on tape
  
  • “Can you just confirm that I just explained to you what the purpose of the interview is, how long it will take and how the recordings will be used; that only the research team will listen to it and findings will be reported in a way that maintains confidentiality with no individual being named?”

  • “Do you have any questions about any of that?”

  • “Are you happy to take part and continue with the interview?”

2. **Current circumstances**

   *Aim: to explore the participant’s life and wider social network in recent months. Researcher note: if participant has suffered recent bereavement, use discretion before exploring issues concerning the participant’s relationship status.*

• Age

• Current housing
  
  • Where living and who with

  • Housing tenure (own home, supported housing, etc.)

  • How long lived there

  • Where lived before

• Relationship status

• Wider family
  
  • Where living

  • Level of contact

• Caring responsibilities
  
  • Children/grandchildren

  • Family members

  • Others

• Who else see regularly/in contact with (friendship networks)

• Recreational interests
  
  • Hobbies and activities

  • Organisation/club/community involvement

  • Frequency of contact with each
• Health
• General perception

CHECK WITH PARTICIPANT WHETHER NEED TO TAKE A BREAK

3. Work and fiscal circumstances
Aim: to explore the participant’s financial and benefit profile to set the context of their Partnership Fund interaction

• Previous work history
  • Ever worked, either inside or outside the home, or both
  • Main activity – probe for brief description and length of time doing each activity mentioned
    • Full-time employment
    • Part-time employment
    • Further education
    • Homemaker
    • Unemployed
  • Invite the participant to think about their current financial circumstances.

• Current income
  • Employers pension
  • State pension
  • Additional benefits claimed:
    • Pension Credit
    • Attendance Allowance
    • Disability Living Allowance
    • Carers Allowance
    • Council Tax Benefit
    • Housing Benefit
  • Financial status
  • Any recent changes to financial status

CHECK WITH PARTICIPANT WHETHER NEED TO TAKE A BREAK

4. Experience of Partnership Fund initiative
Aim: to explore the participant’s interaction with the Partnership Fund by examining their route into the initiative, their initiative experiences and any resulting outcomes.
Invite the participant to think about their experiences of the Partnership Fund initiative, from the first ever contact up to the last encounter including their perceptions of the initiative overall. Researchers should use the local initiative name at first and reflect any labels used by the respondent thereafter. If a prompt is helpful, remind them of a key initiative contact they would have dealt with.

**Initial initiative contact**

- **How they first heard of the initiative**
- **Information received about the initiative**
  - Type of information *(leaflet/letter/phone call/radio broadcast/local media/outreach event/word of mouth)*
  - Who or where they got the information from
  - What they thought of the information received (quality, accessibility, etc.)
- **Who instigated/organised first contact**
  - customer; initiative; project partner referral; by other means
- **When first contact happened**
- **Where took place, suitability of format (location, phone)**
- **Opportunity for questions**
- **Time between first contact and receipt of service (any delay/waiting list)**
- **Whether ever had any contact with that organisation before**
  - For what purpose, when

**Early attitudes**

Probe for:

- **Motivation for accessing initiative services**
  - Financial
  - Gaining information/contact with initiative adviser
  - Potential for developing friendships
- **Initiative expectations**
  - What do/did want to get from the contact
  - Whether ever used services like this one before
  - Significance of ‘initiative contact’ within participant’s life (additional support vs. first assistance ever received)
- **Family/friends view of initiative contact**
Experience of using initiative services

- Who dealt with
  - Continuity of staff contact

- Describe process of receiving service
  - Number of contacts
  - Type of contacts (*face to face*/*telephone*)
  - For each face to face contact, probe:
    - What was the purpose of the meeting
    - What happened
    - What talked about (explore for evidence of benefit advice and more holistic assessment of access to services)
  - What information/advice did the worker provide
  - Accuracy or appropriateness of information/advice provided

- For each phone contact
  - Who instigated
  - For what purpose
  - What talked about

- For those with more than one contact, explore:
  - Reasons for continued contact
  - Who/what facilitated sustained contact (*staff; need; ease of access, etc.*)

- Evidence of after-care post-claim

- Perception of staff throughout contact with the initiative
  - Encourage respondent to reflect on attitude/approach of staff member
  - How it made them feel
  - Level of skill/competency in job
  - Level of confidence in staff member

- Contact with other organisations as a result of meeting with initiative
  - How instigated and by whom
  - Reasons for referral
  - Process and experiences
  - Evidence of multi-agency working
    - Usefulness of referrals
    - seamlessness of service provided across agencies

Appendices – Qualitative fieldwork documents
5. Outcomes from Partnership Fund initiative

Aim: to explore the impacts on the participant from their interaction with the Partnership Fund initiative, particularly related to accessing benefits and services.

Invite the participant to reflect on any impacts the initiative has had. Probe specifically for impacts already felt re accessing benefits and services.

Encourage respondent to reflect on:

• Changes brought about by contact with the service
• Changes in their life as a result of what the service did for them

In the course of the discussion, probe the following:

• Practical help with negotiating ‘the system’
  - Form filling
  - Referral
  - Signposting to other services
• Take up or change in benefits/pensions received
  - Which benefits/pensions (PC, AA, DLA, CTB, HB, others)
  - Whether applied before or first claim
  - For those who applied before – what made this one successful
  - For those who were first claimers, what made them apply now
• Financial help
  - Whether any change to financial position
  - Impact on financial stability
  - Effect on living standards
    - What can afford now that couldn’t before
• Self perception and perception of life
  - Changes to how feel about self
  - Effect on how feel about life
• Psychological/emotional impact
  - Whether changes brought about have affected their psychological or emotional wellbeing
  - Probe for changes to confidence, independence, self efficacy
• Interpersonal
  • Changes to personal relationships / friendships
• Any other parts of their life affected by contact with initiative
• When these impacts began to take effect

Refer back to initial motivations and expectations
• Whether anticipated outcomes were met
• Whether any unexpected outcomes (which ones)
• Contribution of initiative partner groups (if any)

CHECK WITH PARTICIPANT WHETHER NEED TO TAKE A BREAK

6. **Use/access to other services**

*Aim:* to explore the nature and effectiveness of other services accessed or previously experienced by the participant.

*Invite the participant to think about any other services they receive or have received in the last year. If helpful, use significant date prompt to guide the participant.*

• Explore any other services received in last year
• For each service received, briefly explore:
  • Type of service
  • Where/when is it used
  • Who provides/runs it
  • How long had it
  • Whether brought about through contact with Partnership Fund initiative or through other means
  • Explore any evidence of linked services/cross referrals
  • How does service compare with service from Partnership Fund initiative

CHECK WITH PARTICIPANT WHETHER NEED TO TAKE A BREAK

7. **Initiative reflections and suggested improvements**

*Aim:* to explore the participant’s views of the Partnership Fund initiative in the context of the other services received that were previously discussed

*Invite the participant to think again about the Partnership Fund initiative. Reflecting back on this experience and considering their experiences of other services discussed, explore:*
• What elements of PF initiative liked/disliked
• Whether constituted a positive/negative experience
• What did the PF initiative add that the other services didn’t provide (and vice versa)
• how this initiative has helped where other schemes have not, specifically in relation to:
  • help/care received
  • information advice received
  • staff skill/competency
  • staff attitude and approach
  • outcomes achieved
• What would life be like without contact with initiative
• What changes or improvements they would suggest to initiative
• Whether would recommend initiative to other people
  • What sorts of people
  • How would it help them

8. Recommendations for DWP
   
   Aim: to ensure all relevant topics covered and participant’s suggestions for improving services for older people
   
   • What would you advise the Government to do differently to help other people like you
   • What can the government learn from your experiences to help provide better services to older people

   End. Thank respondent and close interview.

At the end of interview, reiterate that the interview will remain confidential.

Tell respondent that they are welcome to contact members of the research team to ask questions at a later date if they wish.

Leave respondent with the following:
• Incentive payment;
• Initiative literature (if relevant)
• Local area services information for follow-up.
Appendices – Qualitative fieldwork documents
**Type and Purpose of Interaction:**

<table>
<thead>
<tr>
<th>Face-to-face information provision (road-show; other outreach):</th>
<th>Remote information provision (telephone call):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Face-to-face detailed advice &amp; claim (office):</td>
<td>Face-to-face detailed advice &amp; claim (customer home):</td>
</tr>
<tr>
<td>Face-to-face follow-up appointment:</td>
<td></td>
</tr>
</tbody>
</table>

**Customer Case Details**

*demographics; social context; benefits history - first claim for support versus additional claim for assistance*
The environment (process):

1. **Setting** (dedicated interview room; customer home; public place):

2. **Seating** (chair; armchair; none):

3. **Between customer – staff** (appropriate space; desk; table / promotion stand):

4. **Level of privacy** (private; semi-private – others can hear interaction; public):

5. **Any distractions** (noise; poor lighting, over-crowded setting; interruptions):
**Evaluative observations:**

**Opening talk: approximate time spent on topic =**
(staff introduces self and initiative; explain observer role; purpose and structure of meeting; appropriate pace; customer provides contextual information; opportunity for questions)

**Strategies for overcoming barriers: approximate time spent on topic =**
(how is information presented – innovative methods used; how is initiative presented - independence; strategies for overcoming fear and suspicion; who raises discussion points and directs)
Explaining entitlement: approximate time spent on topic =
(how is financial information introduced and presented – innovative methods / tools used and needs focused: level of structure and direction; appropriate pace; customers views sought at different stages of entitlement calculation; who raises discussion points and directs conversation)

Partner referrals: approximate time spent on topic =
(how are partners and their purpose introduced; any promotion materials used; who directs subsequent discussion)
Concluding talk: approximate time spent on topic =
(how is the meeting closed - who moves towards closure; meeting closed at logical point; action points for follow-up agreed; further signposting to other services)

Researcher reflections:
(any other observations not covered above)
Post-observation reflections (process, procedures & outcomes): Customer

- What aspects of interaction went well / were popular (prompt if appropriate):
  - Venue and length of meeting - Process
  - Advisor effect - staff skill / care (nature of contact - personalised) - Process
  - Promotion material / project information - Procedure
  - Clear explanations of entitlement - Procedure
  - Personal confidence building - helps retain independence - Process
  - Individualised / person centred approach - Process
  - Strong links to other relevant partners / services - Procedure

- Expectations met / unmet need - Outcome
- What could be done differently - Outcome
- Compare to contact with other benefits services - Outcome
- Feelings about future contact with initiative and partners - Outcome
Post-observation reflections (process, procedures & outcomes): Initiative staff

- What aspects of interaction went well (prompt if appropriate):
  - Venue and length of meeting - Process
  - Response to innovative methods - Procedure
  - What are the markers of a successful contact - Outcome
  - Customer expectations met / unmet need - Outcome
- How comparable to other interactions - Outcome
- What could be done differently - Outcome
- Feelings about future contact with customer (positive for follow-up / unsure) - Outcome
Appendix D
Quantitative technical report

A quantitative telephone survey of all 173 Partnership Fund funded schemes was conducted between July and September 2006 to collect information on the types of service provision funded by the Partnership Fund and help to identify common issues among the schemes.

This technical report augments the description of the quantitative research provided in Chapter 1. It gives more detail about the survey response rate, the conduct of the survey using computer assisted telephone interviewing (CATI), the survey instrument, and data processing and analysis.

Response rate

The response rate for the Partnership Fund evaluation for Stage 1 and Stage 2 was 97 per cent. This is based on the combined achieved interviews for Stage 1 and Stage 2. The unproductive\(^9\) cases for Stage 1 were rolled forward to Stage 2.

<table>
<thead>
<tr>
<th>Outcome</th>
<th>Number of projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interviews achieved</td>
<td>167</td>
</tr>
<tr>
<td>Unproductive cases</td>
<td>6</td>
</tr>
<tr>
<td>Total (sample size)</td>
<td>173</td>
</tr>
</tbody>
</table>

The Partnership Fund projects’ obligation to participate in the evaluation exercise helped in obtaining interviews with respondents in the Partnership Fund projects. On the whole, interviewers reported that the Partnership Fund projects were enthusiastic about participating in the research and contacted the telephone

---

\(^9\) Unproductive cases include: where contact was made and interviewer was asked to call back; where contact was not made with the respondent and the interviewer was asked to call back; broken appointments; disconnected or unobtainable telephone numbers; and, refusals.
interviewers to make an appointment. Those who were reluctant to participate in the study tended to report pressure of work where the respondent felt that they did not have time to participate (e.g. a circumstantial refusal). In these cases, interviewers reminded project staff of their obligation to take part in the study under the conditions of their contract and this was often sufficient for appointments for interview to be re-scheduled. A minority of projects who broke appointments on more than one occasion or continued to refuse to participate were contacted by Department for Work and Pensions (DWP) by letter to remind them of their contractual obligation to take part in the research. These letters proved successful in persuading projects to participate. A copy of this letter is appended, see Appendix A.

Survey respondents included a variety of project staff. A breakdown is given below.

<table>
<thead>
<tr>
<th>Respondent role in Partnership Fund project</th>
<th>% of project respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organisational director/manager</td>
<td>29</td>
</tr>
<tr>
<td>Management committee member</td>
<td>1</td>
</tr>
<tr>
<td>Project manager</td>
<td>42</td>
</tr>
<tr>
<td>Project worker including benefits adviser</td>
<td>19</td>
</tr>
<tr>
<td>Administrative staff</td>
<td>2</td>
</tr>
<tr>
<td>Role not given</td>
<td>8</td>
</tr>
<tr>
<td>Base</td>
<td>167</td>
</tr>
</tbody>
</table>

At the close of fieldwork there were six projects with which an interview had not been achieved. The reasons for not participating in the research are shown below.

<table>
<thead>
<tr>
<th>Reason for refusal</th>
<th>Number of projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project not started work</td>
<td>1</td>
</tr>
<tr>
<td>Sickness</td>
<td>1</td>
</tr>
<tr>
<td>Office move</td>
<td>1</td>
</tr>
<tr>
<td>Broken appointment late in fieldwork</td>
<td>3</td>
</tr>
</tbody>
</table>

Survey conduct

The survey was conducted using computer assisted telephone interviewing (CATI) in order to ensure the most efficient approach to contacting the Partnership Fund projects which were geographically very dispersed.

The CATI instrument was programmed using Blaise by specialist computing staff. Blaise allows a variety of complex procedures to be incorporated into the questionnaire. The Blaise program was particularly useful for ensuring that the individual Partnership Fund project name could be inserted into the question wording (as a text-fill) to ensure that respondents referred to the work conducted with Partnership Fund money. This was particularly important for Partnership Fund projects operating as part of a wider organisation. There were also a number of
follow-up questions within the questionnaire (particularly in the Stage 1 design) which were programmed in Blaise. All of these elements would have been significantly more difficult to administer in, for example, a self-completion paper questionnaire.

The nine telephone interviewers and four project supervisors were briefed face-to-face by a National Centre for Social Research (NatCen) researcher on all aspects of the survey prior to fieldwork. Briefings were also attended by DWP. The background to the research and its importance were conveyed and definitions to be employed throughout the questionnaire, such as ‘partnership working’, were explained. A separate briefing was held for the Stage 1 and Stage 2 fieldwork. Three of the interviewers who conducted interviews in Stage 1 also worked on the Stage 2 study. Each briefing took around two hours, in which time the background to the study and particular points of interest were relayed to the interviewers and a mock interview was conducted so that instructions on particular questions could be given and interviewer queries answered. Written instructions on how to conduct the interview and the points raised during the briefing were also provided for interviewers’ reference. Interviewers began contacting respondents after a short period of familiarisation with the questionnaire. Supervisors monitored the quality of the interviews and were able to provide support and guidance to interviewers as required thus ensuring the quality of the data collection. The supervisors were also able to provide the research team with regular updates on the progress of the research.

A member of the NatCen research team ‘observed’ several interviews in Stage 1 and Stage 2 to obtain first-hand feedback on how well the questionnaire was working and the projects’ response to it. This information helped inform improvements to the questionnaire for Stage 2 and provided an opportunity to assess how successful those modifications had been in comparison with Stage 1 interviews.

Stage 1 interviews were much longer than expected and, on average, lasted just over an hour. There were several reasons for this. Firstly, respondents were routed to more questions than expected due to the broad range of approaches they employed to providing help and support to their customers. Also, follow-up questions collected a great deal of detail for each of the main activities the project was engaged in which added to the interview length. Finally, respondents were keen to ensure that all of the activities the project was engaged in were reported to the interviewer, even where the information provided was not required in order to answer the question posed. Although interviewers did their utmost to encourage the respondent to answer the questions as written, as they are trained to do, the additional input by respondents further contributed to the interview length.

Following revisions to the questionnaire for Stage 2 the mean interview length was reduced to 51 minutes and the median interview length was 49 minutes.
As discussed above, it was originally anticipated that not all the survey questions would apply to all projects and therefore that the questionnaire would be of a manageable length for a telephone interview. However, the outcomes from the Stage 1 fieldwork revealed this not to be the case and as a result of this, and following feedback from the telephone interviewers, changes were made to the survey instrument. The issues addressed related to the high level of detailed information required from respondents and the resultant increased interview length. The complexity of the questionnaire was significantly reduced by removing most of the questions that aimed to expand on an answer given to a previous question. For example, at Stage 1 respondents were asked to provide detailed information about the types of people the project targeted and aimed to support. For each group identified, respondents were asked if they had always supported this group or whether their focus had changed over time. In Stage 2, in order to reduce repetition, respondents were asked the same question but only once with regard to all the project’s customer groups. Furthermore, answers recorded as ‘other – specify’ descriptions during Stage 1 were incorporated into the answer categories for Stage 2 with the aim of reducing time needed by interviewers to record the answers given. These changes resulted in a more efficient survey instrument. Interviewers who worked on both stages of the survey offered positive assessments of the improvements that had been made to the CATI survey instrument for Stage 2.

A copy of the final survey instrument is available via the DWP website (www.dwp.gov.uk).

Data processing and analysis

The data was edited and analysed using Statistical Package for the Social Sciences (SPSS). Stage 1 and Stage 2 data were edited and combined in order that they were analysed as a complete dataset. The data from both stages were checked for consistency and to ensure that all cases were accounted for at each question (i.e. the questions had followed the intended routing paths). It was agreed with DWP that separate unedited Stage 1 and Stage 2 datasets would be delivered. In addition it was agreed that a final dataset including Stage 1 and Stage 2 data would be produced for analytical purposes and this was delivered to DWP in November 2006. The recoding of the data took different forms depending on the nature of the data collected and the differences between Stage 1 and Stage 2 questions, but the approach was to recode Stage 1 data to ‘fit’ the Stage 2 data structure.
To this end, the Stage 1 data was recoded to match as closely as possible the data collected in Stage 2 without losing the sense of the information collected in Stage 1. This was achieved by creating new derived variables which were then merged into the final dataset. The majority of the newly derived variables were required where:

- Questions were asked in a different way in the two stages to improve cognition but were essentially collecting the same information. In these cases, Stage 1 variables were recoded to an equivalent Stage 2 variable.

- Question loops had been reduced. In cases where multiple response category questions had been recoded to a single answer question in Stage 2, the Stage 1 data collected in each question loop was recoded as if the question was asked only once. This was straightforward where the same answer was given in each loop. Where the answers for each loop differed, the answers were coded in priority order.

- Questions were removed from the survey instrument for Stage 2. Questions asked at Stage 1 that were removed for Stage 2 were removed from the combined final dataset because the small number of projects interviewed in Stage 1 meant that this data was of very limited value for analysis.

Before the Stage 1 and Stage 2 data could be matched, derived variables were created in Stage 2, which mostly involved creating a renamed copy of an existing variable.

Stage 1 and Stage 2 data was further edited where there were open questions or ‘other – please specify’ answers. These data were recoded to produce a categorical variable for analysis purposes. The ‘other – specify’ answers were recoded to existing categories where appropriate. Where a common answer was described but not present in the coding frame, this was added as a new category.

All new and existing variables were given labels to describe their content and the values were similarly labelled.

In order to describe the proportion of projects who undertook a certain activity, all of the multiple response data were recoded into separate variables with the following values: –1 where the question did not apply; 0 where the project did not report the activity at that question (e.g. where the category did not apply to the project); and, 1 where the project answered this category.

The data reports the proportion of cases where the questions did not apply (e.g. where the project did not undertake a particular activity at all) and the cases where there was a ‘don’t know’ response so that the experience of all projects is reported.
Appendix E Qualitative technical report

The qualitative component involved in-depth case studies of 13 purposively selected projects. Using in-depth interviews and observations of project activity, the aim was to collect evidence from Partnership Fund project staff, staff at their partner organisations and their customers to explore multiple perspectives on project set-up, delivery and outcomes. This technical report augments the description of the qualitative research design provided in Chapter 1 and gives more detail about the rationale for the case study sample design and within-case sample design, the selection of customers and observation encounters, customer recruitment, and the analysis of the qualitative data.

Sample design

There were two elements to designing the sample for the qualitative case study component of the evaluation: the overall case-study sample design; and, the consideration of the units to be sampled within each case-study.

Case study sample design

Following consideration of the initial evaluation design, and prior to the commencement of the evaluation, it was agreed that the Department would fund a preliminary scoping stage in order to gather more information about the 173 funded projects and important contextual issues. This information would be used to inform the development of a robust qualitative case-study design. The scoping activity was carried out between June and August 2005 and comprised the following activities:

- A brief review of the existing evidence base.
- An examination of the local Pensions Service infrastructures.
- Meetings with LinkAge personnel.
• An analysis of Department for Work and Pensions (DWP’s) database of Partnership Fund projects.
• Review of documentation for selected Partnership Fund projects.
• Design and selection of provisional sample for evaluation.

Detail about the conduct and outcome of each of these components is available in ‘The Partnership Fund Evaluation - Revised research proposals’, submitted to the Department in September 2005.

Following interrogation of the database of Partnership Fund projects and using information gathered during the series of meetings with LinkAge personnel, the research team were able to draw up a list of key criteria on which the final selection of qualitative case-study projects should be based. These criteria included those considered by the Department when awarding funding and were refined in light of the database information held about the schemes and knowledge of their activities to date. These criteria were:

• Type of ‘parent’ organisation: Local authority; Statutory health; Voluntary local; Voluntary national.

This sampling variable describes the type and nature of each organisation delivering a Partnership Fund project. It was apparent from the scoping research that the experience, level of partnership working and logistical support-resources available to projects often depended on type of organisation within which they were situated. Organisation-type was therefore a key variable for inclusion to ensure projects selected were as diverse and representative as possible.

• Environment: Rural; Urban; Mixed.

This variable describes the environment/location of customers for each project. As the overarching aim of the Fund was to improve take up of benefits of hard to reach elderly people, the delivery methods utilised to meet this aim varied according to project environment. Environment was therefore a key variable for consideration to ensure that the cases selected capture the national position, whilst also reflecting the policy focus of both DWP and Department for Environment, Food and Rural Affairs (Defra).

• Main (customer) audience: Generic; Carer; Disability; BME.

---

9 The database of management and administrative data (MonProD) is compiled by DWP’s Operational Researchers and profiles the activities, audience, outcomes and distribution of the 173 Partnership Fund projects. Data is gathered from monthly and 6-monthly reports submitted to the Department by funded projects.

10 The ‘parent’ organisation refers to the organisation within which the Partnership Fund project is located. For example, where a project is located within the advice team at a local authority, its parent organisation is the local authority.
The ‘main audience’ sampling variable refers to the main target group specified in the project’s funding application. Achieving a diverse selection of projects targeting each of these categories was essential to understand and evaluate the nature of innovative methods that optimise socially inclusive, independent living across the full range of Pension Service customers.

A key outcome of the Partnership Fund evaluation was to establish good practice for innovative service delivery. A review of literature regarding successful delivery of services for older people, in tandem with the project summaries, highlighted two dimensions of Partnership Fund projects considered to connote ‘innovation’. Two new variables were created to capture these dimensions:

- **Customer Approach**: Pro-active; Passive.
  
  This variable distinguished between projects whose customer approach was ‘pro-active’, where the responsibility for making contact with a potential customer/client lay with the project, and ‘passive’ where the onus was on the customer to initiate and/or maintain contact with the project.

- **Delivery Mechanism**: Personal; Both impersonal and personal methods.
  
  This variable was created to account for the different methods employed for project delivery. It distinguished between three types of delivery mechanism: ‘personal’, defined as flexible, face-to-face methods which responded to the individual needs of the customer, for example home visits; ‘impersonal’, defined as incorporating inflexible methods which were not tailored to the needs of the individual, for example poster and leaflet advertising and information, and; projects which utilise ‘both’ personal and impersonal delivery mechanisms.

- **Size**
  
  Size was initially estimated on the basis of the number of staff hours but was later revised and the average annual running cost of the project was used as a proxy for project size.

All 173 Partnership Fund projects were coded to map their distribution across these key identified characteristics. This then served as the broad sample frame for selection of projects for the case study investigation. A subset of 36 projects were then selected to represent diversity across the key project variables outlined above and the full Fund application from each was reviewed. Information was collected in order to better understand projects’ approaches to innovative working, identify specific issues which would affect the final design of the evaluation and, ultimately, recommend the provisional selection of a number of projects for inclusion in the qualitative component of the evaluation.
Following this process of review, 13 projects (12 local and one national) were purposively selected as the provisional group of projects to be included in the evaluation to reflect the diversity apparent across the 173 Fund projects. Two of the projects in this original selection subsequently withdrew from the evaluation. In one case, this was because limited staff resources made participation difficult and burdensome. The other project had concerns about contacting its customers, who had a specific disability, and gaining their informed consent. These schemes were replaced with two others that, as far as possible, shared the same key characteristics.

Within-case sample design

Within each case study, it was proposed that in-depth interviews would be conducted with project staff, their customers, and staff at projects’ partner organisations, including the Pension Service Local Service (PSLS). The rationale for including each of these stakeholder groups is outlined below.

Project staff were interviewed in order to explore projects’ approaches to identifying customers and delivering services to them. They were also important to understand the challenges projects faced in achieving these objectives and any factors that helped them. Staff responsible for both project management and delivery were included in order to gain perspectives on both the set-up and maintenance of projects, and their successes. It was proposed that up to 45 staff from the selected projects would be interviewed, with some discretion to speak to more staff at larger projects or those with a more complicated staffing structure than at smaller projects.

A key focus of the evaluation was to examine the relationships developed by different organisations delivering services to older people in a local area, and the impact that they had on the nature and quality of service access, delivery and outcomes. Interviews were undertaken with a selection of project partners from each of the selected case study projects. Partners included: the local pensions service (see below); organisations that referred customers to the project, and those to whom it referred customers; statutory agencies such as local authorities and PCTs; and, voluntary and community organisations. Thirty interviews with staff from partner organisations were proposed to allow an average of two per project with some additional capacity where projects had a greater number of partners.

Partnership Liaison Managers (PLMs) are responsible for the development of partner working between the PLSL and other statutory and voluntary organisations in their locality. To explore the relationship between Partnership Fund projects and the Pension Service the research team identified that an interview with the PLM in each case-study area would be an informative and valuable component of the overall evaluation. As well as discussing the relationship between projects and the Pension Service, PLMs were also able to provide contextual information on the overall level of partnership working within a particular area and the development of other DWPs initiatives including Joint Teams and Alternative Offices, helping
to set the Partnership Fund projects in a local context. Interviews with PLMs were included in the proposed total interviews with partners.

Interviews with customers of Partnership Fund projects provided an insight into how projects delivered their services from the perspective of their clients, and complemented the data gathered from staff and partner interviews. Customers were older people who had been in contact with the services, and may have received or been referred to services or encouraged to take up benefits. A diverse sample of older people across the selected projects were included: sampling criteria included age, relationship status, ethnicity and their use of the project. Up to 65 interviews with customers across the 13 projects was proposed, again with discretion to draw on more customers from larger projects or those with more activities, and fewer from smaller more focused ones.

In addition to the different types of depth interviews described above, the evaluation of each project will include an element of observation of project activity, in order to contextualise and triangulate the evidence collected in the other elements of the study. Activities included sitting in on one-to-one consultations between project staff and customers and observing surgery or outreach activity. Thirteen days of observation activity were proposed across the selected case study projects in order that a wide variety of activities could be encountered.

Selection and recruitment of customers

This method of sampling and recruiting customers described in Chapter 1 had a number of advantages. Concerns over data protection were resolved by customers consenting for their details to be shared prior to any contact from the research team. Initial contact via the projects reassured customers of the legitimacy of the research and its credibility. Another advantage of this method was that information about the research was given to customers at several points in the recruitment process - at the initial consent stage, in the follow-up letter after final sample selection, during the recruitment telephone call and with the letter to confirm their interview appointment. These multiple contacts were designed to ensure that customers were fully informed about the purpose of the research and had a number of opportunities to seek clarification or ask questions of the research team.

Alongside these advantages, this approach also raised a number of challenges. One was the potential for projects to ‘cherry pick’ customers who had experienced the most positive outcomes. To mitigate against this possibility, each project was asked to select twenty customers, from whom only five would be selected for interview. This method allowed the research team some control over the final achieved sample. Because the final selection of customers interviewed was not known by projects, this two-stage selection process also had the advantage of giving customers a degree of anonymity. While this process worked smoothly in some projects, in other cases, fewer than twenty customers consented to be contacted which limited the degree to which it was possible to be selective about
who to interview. It is also possible that the ‘opt-in’ consent procedure biased the sample towards customers with the most positive experiences. This possibility was fully acknowledged by the research team and every effort was made to try and ensure that a diverse range of customers were included in the sample. In total, 60 customer interviews were conducted. Of these, 23 were paired interviews with married couples or customers who otherwise lived together, bringing the total number of customers interviewed to 83. For the purposes of sample monitoring, data was collected for the primary respondent in each case. The achieved sample is shown in Chapter 1, Table 1.4.

The table shows an even number of male and female customers, a good spread across age groups and between respondents who were married or single. There was also some considerable variation in the types of benefits about which customers had received advice or assistance and some participants had received help with more than one type of benefit. The case study sample included two projects that specifically focused on providing services to older people from Black and Minority Ethnic (BME) communities and one other for whom BME older people formed a significant proportion of its customers. The sample therefore included a larger proportion of White British customer respondents than BME. The majority of participants had experienced at least three contacts with the project. This may be because these customers had a relationship with project staff and staff therefore felt they were more likely to want to participate in the research. This raises the issue that such customers might present different experiences of the project as a result of prolonged and multiple contacts with its staff than those with fewer contacts and this should be borne in mind when interpreting the data collected from these participants. Whilst there was a more even distribution within the sample in terms of when the customer had last had contact with the project, the emphasis was on those in contact with projects more recently. Reasons for this might include the fact that customers may have felt they had sufficient recall to participate in the research where there experience was more recent, and felt the research was more relevant for them. In practical terms, these customers may have been more top-of-mind for staff who were asked to select customers on the research team’s behalf.

**Selection of observation encounters**

Care was taken to select contexts in which the presence of a researcher would be unlikely to affect the delivery of the service. This decision was made in consultation with project staff who were able to draw upon their knowledge of the physical context of the encounter and the likely needs of customers who accessed the service using that delivery mode. Researchers and staff were also concerned that customers approached to participate in an observation fully understood the research and could give informed consent to participate. This was particularly pertinent for projects whose customers had mental health difficulties and researchers were led at all times by the knowledge and expertise of project staff.
Analysis

Interviews were digitally recorded and later transcribed verbatim. Transcripts were analysed using ‘Framework’, a method developed by the Qualitative Research Unit at NatCen. The first stage of analysis involves familiarisation with the transcribed data and identification of emerging issues to inform the development of a thematic framework. This is a series of thematic matrices or charts, each chart representing one key theme. The column headings on each theme chart relate to key sub-topics, and the rows to individual respondents. Data from each case is then summarised in the relevant cell. The context of the information is retained and the page of the transcript from which it comes is noted, so that it is possible to return to a transcript to explore a point in more detail or extract text for verbatim quotation. This approach ensures that the analysis is comprehensive and consistent and that links with the verbatim data are retained. Organising the data in this way enables the views, circumstances and experiences of all respondents to be explored within an analytical framework that is both grounded in, and driven by, their own accounts. The thematic charts allow for the full range of views and experiences to be compared and contrasted both across and within cases, and for patterns and themes to be identified and explored.

To accommodate the different experiences of staff, partners and customers, a separate Framework was developed for each respondent group. The data gathered in the observations pro-forma was also analysed using Framework. Data was analysed by respondent- and project-type and, so that the case-studies were analysed holistically, data from all the in-depth interviews and observations conducted with individual case-studies were also analysed together.
References


