Work Focused Interviews for Partners and enhanced New Deal for Partners evaluation: Synthesis of findings

Nick Coleman and Ken Seeds

A report of research carried out by BMRB Social Research on behalf of the Department for Work and Pensions

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<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Definition</th>
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<tr>
<td>ADF</td>
<td>Adviser Discretion Fund</td>
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<tr>
<td>BMRB</td>
<td>British Market Research Bureau</td>
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<tr>
<td>BOC¹</td>
<td>Better Off Calculation</td>
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<tr>
<td>DiD</td>
<td>Difference in Differences</td>
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<td>DWP</td>
<td>Department for Work and Pensions</td>
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<tr>
<td>FTA</td>
<td>Fail to Attend</td>
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<td>IB</td>
<td>Incapacity Benefit</td>
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<td>IS</td>
<td>Income Support</td>
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<tr>
<td>IV</td>
<td>Instrumental Variable</td>
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<tr>
<td>IWBC</td>
<td>In Work Benefit Calculation</td>
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<tr>
<td>JSA</td>
<td>Jobseeker’s Allowance</td>
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<td>LMS</td>
<td>Labour Market System</td>
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<td>NDLP</td>
<td>New Deal for Lone Parents</td>
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<tr>
<td>NDP</td>
<td>New Deal for Partners</td>
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<tr>
<td>NVQ</td>
<td>National Vocational Qualification</td>
</tr>
<tr>
<td>PA</td>
<td>Personal Adviser</td>
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<tr>
<td>PSI</td>
<td>Policy Studies Institute</td>
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<tr>
<td>SDA</td>
<td>Severe Disablement Allowance</td>
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¹ BOCs were previously referred to as IWBCs (In-Work Benefit Calculations).
<table>
<thead>
<tr>
<th>Abbreviation</th>
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<tbody>
<tr>
<td>WASD</td>
<td>Working Age Statistical Database</td>
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<tr>
<td>WFI</td>
<td>Work Focused Interview</td>
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<tr>
<td>WFIP</td>
<td>Work Focused Interviews for Partners</td>
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<td>WBLA</td>
<td>Work Based Learning for Adults</td>
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Summary

Background

Work Focused Interviews for Partners (WFIPs) and an enhanced New Deal for Partners (NDP) were introduced in Jobcentre Plus offices in April 2004. The main policy objectives are to help partners find work or move them closer to work, thereby helping to reduce the number of workless households and child poverty.

The evaluation of WFIP and NDP comprised a number of strands, including qualitative work with partners, main claimants and advisers; a quantitative survey of partners and main claimants; an impact assessment based on analysis of movement off benefit in administrative data; and a cost benefit analysis.

Impact of WFIPs/NDP

There is little evidence of WFIPs helping to change actual behaviour by increasing the number of partners in work or looking for work. Impact analysis of the effects of WFIP and NDP on benefit claims shows that, for stock couples, WFIP eligibility appears to reduce benefit claims after 37 weeks by around one percentage point. However, this may be driven by a deterrent effect, with WFIP participation doing little to encourage benefit exits. For flow couples, no significant effects of WFIP eligibility or participation were evident, although there were indicative effects noted for NDP and NDP/WFIP combined.

The quantitative survey confirmed that very few couples were moving off benefit, and that not all those leaving benefit had moved into work.

Although WFIPs and NDP had made some partners consider increasing their hours, there was no evidence from the quantitative survey of this happening in practice other than in isolated instances.

The ability of WFIP and NDP to reduce child poverty is extremely limited, because of the limited movement into work, and the preponderance of low-paid, part-time work among those who do move into employment. For the same reasons, cost-benefit analysis showed that the programme is not currently cost-effective.
Nevertheless, WFIPs were often seen as having a positive impact on partners’ confidence and in increasing their knowledge of support available. It needs to be borne in mind that a large proportion of the target group are not in a position to work at the time of the WFIP, but the majority are positive towards the possibility of work when circumstances permit. Increasing partners’ confidence may only be an initial step towards employment, but this is important in helping to increase the chances of a return to work at an appropriate time. However, advisers stressed that this represents a significant amount of effort for little or no short-term impact.

Characteristics of partners and their households

The limited success of the programme needs to be viewed in the context of the characteristics and circumstances of partners and their households. Many partners face complex barriers to work. In addition to illness and disability, childcare and caring responsibilities, many feel they do not have sufficient qualifications or experience for their local labour market. Financial pressures are also a significant problem for many partners. Around a quarter of the sample do not feel work would leave them financially better off than benefits, because of the type of work they would be able to find and the limited hours they could work.

However, it is important to note that not all barriers affect the type or amount of work partners can do. Even when a particular barrier, such as a health problem, does restrict the volume of work partners can undertake, many are still able to consider part-time working hours.

This relates to a wider issue of part-time and flexible working. Advisers felt that it could be difficult to find work that matched partners’ (often specific) needs regarding hours and flexibility. However, the recent Harker report noted the fact that ‘at present Jobcentre Plus does not systematically promote or broker flexible working arrangements on behalf of customers’, and that ‘as a minimum, the level of information about the nature of jobs needs to improve. Job adverts do not routinely state whether there are opportunities to work flexibly’\(^2\). A further difficulty is that very few couples currently consider formal childcare, and this issue will need to be addressed in order to increase the number of instances where both partners are working.

More generally, household and relationship issues exerted considerable influence over partners’ behaviour, but were frequently the most difficult for advisers to address. The dynamics of relationships between partners and claimants overlaid all other factors affecting decision making and work related behaviour.

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Work Focused Interviews for Partners

Advisers often did not expect to obtain positive outcomes with partners, because of their barriers and complexities. These negative impressions were compounded by the low status allocated to WFIPs, specifically a low priority in terms of points allocated to successful outcomes, limited training, and a general sense of fitting WFIPs around other priorities (partly because of the small numbers of partners coming through).

WFIPs were restricted to half-hour time slots, which was seen as appropriate in most cases but sometimes insufficient to explore complex circumstances. Where the WFIP was very short, some partners perceived their WFIPs as being rushed, and this could damage their view of Jobcentre Plus and the likelihood that they would return for advice or support in the future.

Partners were mostly in favour of joint WFIPs, and the evaluation suggests that they should be encouraged, in order to examine the household’s situation as a whole. Some reservations were voiced by advisers, however. They felt that joint interviews were not appropriate for everyone (especially partners caring for the main claimant), and found them more difficult to deliver.

The majority of partners did not feel that the timing of the WFIP was appropriate, because they did not expect to be able to work in the foreseeable future. Nevertheless, most partners did find the WFIP helpful, in increasing their confidence and making them more aware of their options.

A Better Off Calculation (BOC) was often seen as the most valuable tool available to advisers, although this was mostly used in a follow-up interview rather than the initial WFIP. Results of BOCs tended to be most positive for those with children, although this often showed them to be only marginally better off. Many partners found they would not be financially better off in work; this was most likely to be the case for carers.

Advisers said that they found BOCs difficult for partners, which could cause inconsistencies or errors. Given the importance of BOCs, this is an area where additional training should be considered, along with training on conducting joint interviews, and specialist training to deal with particular barriers (in particular disability and caring).

WFIPs appeared to work best for partners of JSA claimants, but to be more problematic for partners of Income Support (IS) and Incapacity Benefit (IB) claimants, especially those with health problems or disabilities and carers. These partners were less likely to see the WFIP as relevant, and felt that the adviser was unable to provide the specialist advice, or a referral to an appropriate agency, that they required.
New Deal for Partners

The impact analysis of administrative data indicated that WFIP participation had increased NDP participation by around 3.5 percentage points, although the numbers going on to NDP were still very small: around one per cent of eligible partners.

NDP was most relevant to those looking for work, where NDP could help with job search or training. In some cases, the offer of help through NDP was well timed, as it helped to clarify their job goals. Other participants attended further meetings specifically to receive a BOC. Where partners were not actively looking for work, inactive case loading was particularly important. There was no formal process to deal with this, with considerable autonomy given to advisers to manage this in an informal way. A more structured approach, possibly including mandatory review meetings, could help to improve the longer-term support more consistently.

Perceptions of NDP were strongly influenced by the outcome obtained. Advisers felt that NDP lacked effective incentives for partners, and was generally unproductive. While NDP helped some partners to move into work, others left quickly, either because of a negative BOC or inability to overcome barriers to work.

Positive views were more common among partners receiving help towards self-employment and those receiving training; these partners generally received greater support from NDP. Training was particularly appreciated where short courses with flexible hours were available, although such courses could be in short supply, and were generally not available through Jobcentre Plus.

However, as with WFIPs, NDP struggled to help partners with multiple barriers, and was seen as helping partners on an individual level without necessarily addressing the needs of the family as a whole.

Future options

Suggestions for future policy development include:

- Improving delivery: Excluding certain partners through an initial sifting process; this would help to minimise unproductive effort, but would need to be effective in identifying cases where work was not a possibility, even in the longer-term. Otherwise, this approach could undermine the success of the programme in at least increasing confidence and raising awareness of help available.

- Enhancing current strategy: Greater focus on skills; for the majority of partners who are not job-ready, it may be appropriate to place a greater emphasis on improving skills by providing on-going assistance with training and development. While this will not increase job entry in the short-term, it is likely to have an impact longer-term.
• Change current strategy: A family focus, providing integrated support for the couple and family as a whole; this reflects current policies targeting a reduction in child poverty. This could involve approaching the partner through the main claimant, but would need to incorporate substantive enhancements to the current WFI system, in order to address the fundamental difficulties facing these families.
1 Introduction

1.1 Background

1.1.1 WFIP

Work Focused Interviews for Partners (WFIPs) and an enhanced New Deal for Partners (NDP) were introduced in Jobcentre Plus offices in April 2004. From this date, the non-working, non-claiming partners of working age benefit customers were required to attend a one-off mandatory meeting with an adviser to discuss their work options. Those targeted are the dependent partners of customers in receipt of either income-based Jobseeker’s Allowance (JSA), Income Support (IS), Incapacity Benefit (IB), and Severe Disablement Allowance (SDA). JSA customer couples born since 1957 and who have no dependent children living with them are not subject to WFIPs but come under the Joint Claims initiative. The WFIP initiative closely mirrors the requirements placed on Jobcentre Plus claimants to attend a WFI, with a system of deferrals and waivers in place to protect partners for whom work is not a viable option.

WFIPs are triggered at the 26 week point in the claim of the main benefit claimant. ‘Flow’ cases comprise the partners of benefit customers for whom this trigger point was reached after April 2004. ‘Stock’ cases represent the partners of customers whose claim had already been in existence for more than 26 weeks at the start of the initiative.

1.1.2 NDP

NDP was enhanced and re-launched nationwide at the same time as WFIPs were introduced, with WFIPs designed as a new route onto NDP. WFIPs and NDP form part of the policy intent to extend Jobcentre Plus services on an equal basis to its different customer groups, and bring support and provision for dependent partners in line with the wider policy aim to extend Jobcentre Plus services.

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3 The WFIP initiative was introduced in all integrated Jobcentre Plus offices and is complemented by NDP which is available nationwide.
with other groups. In addition to assistance with job search and information about Tax Credits and in-work benefits, NDP includes access to:

- the Adviser Discretion Fund (ADF);
- a training allowance for participants of approved training;
- the same training and support as available under the New Deal for Lone Parents (NDLP) – that is Work Based Learning for Adults (WBLA), contracted occupational provision up to National Vocational Qualification (NVQ) level 2, and ‘bespoke’ provision subject to a business case being made by an adviser and accepted;
- the New Deal self-employment and test trading option;
- a childcare subsidy for partners taking up work of less than 16 hours per week.

Some partners of JSA customers without dependent children were already included within the remit of Joint Claims. Joint Claims is a parallel initiative, which currently applies to couple claimants born after 1957 who have no dependent children living in the household. Joint Claims is a separate initiative from WFIPs and subject to separate evaluation. JSA claimants whose partners are included in the WFIP initiative are those couples who have dependent children, and couples where the main claimant was born before 1957.

1.2 Objectives of WFIP and NDP

A major policy interest lies in the fact that a large proportion of the children currently living in poverty in the UK are in workless households where income is provided by benefits (JSA, IS and IB). The partners in these households are now eligible for mandatory WFIPs and for voluntary support under NDP. Therefore the policies are intended to reduce the number of children living in workless households.

The high-level policy objectives for WFIPs and NDP are to:

- reduce the number of workless households;
- encourage partners in workless households to achieve a successful and sustainable entry into employment;
- help progression to better and/or full-time work for partners already working part-time;
- create the conditions for those who are not immediately job ready to make or regain contact with the labour market by assisting them to acquire the skills, confidence and social stability to increase their employment opportunities and to compete effectively in the labour market;
- give partners parity with other benefit claimants in accessing Jobcentre Plus programmes;
- reduce child poverty.
Operational objectives include:

- extending Department for Work and Pensions (DWP) services and labour-market opportunities to clients who have traditionally been excluded from such sources of assistance, and so make partners aware of the services they can access now and in the future;
- providing the opportunity to increase the hours that partners work, their earnings and the general standards of living in households;
- making the most effective use of public money, in terms of encouraging partners to move into work;
- improving partners’ confidence, sense of wellbeing, self-esteem and attitudes towards work;
- increasing the numbers both seeking and moving onto DWP programmes;
- improving awareness and knowledge of benefits and routes onto DWP programmes, training and work, and any other issues and information important to the client group in helping them to return to and sustain work;
- improving the motivation, work skills, experience, qualifications and job-search skills of partners.

1.3 WFIP/NDP evaluation

The evaluation of WFIP and NDP comprised a number of strands, as described below.

1.3.1 Qualitative research with partners, main claimants and staff

The qualitative evaluation of the WFIP and enhanced NDP was carried out by Insite Research and Consulting. It involved two phases of fieldwork approximately 12 months apart. Each phase comprises two elements: research addressing the WFIP initiative, and research focused on the NDP programme.

The first phase covered initial issues from the early months of implementing WFIPs and the enhanced NDP programme, their administration and delivery, the perceptions of advisers, the reception by the customer group, and immediate outcomes and impacts.

The aims of the second phase were to add a longitudinal aspect to the evaluation and to explore changes in the delivery and management of the initiative, in the perceptions of Jobcentre Plus staff and in the experiences and perceptions of customers over the period of approximately 12 months since the first phase of work.

Phase 1 fieldwork

Phase 1 involved a total of 120 individual, in-depth face-to-face interviews with WFIP and NDP participants and their (main claimant) partners (60 interviews with 30
couples for each of the WFIP and NDP elements); and 76 interviews with Jobcentre Plus staff and managers. Fieldwork for both aspects of the research took place in the same five Jobcentre Plus districts (one each in Wales and Scotland, one in London and two in other regions of England). Interviews took place between August and October 2004 (WFIP interviews) and December 2004-February 2005 (NDP interviews).


**Phase two fieldwork**

Phase two WFIP fieldwork took place in the Autumn 2005, approximately 12 months after the first phase and 18 months from the start of the initiative. NDP fieldwork took place in February and March 2006, also approximately 12 months after the first phase interviews.

Interviews were carried out in the same five Jobcentre Plus districts as in phase one. For the staff interviews, where possible, follow-up interviews were sought with the same respondents as in phase one. Repeat interviews were also conducted with customers. As in phase one, paired in-depth interviews were conducted with couples.


**1.3.2 Quantitative survey of partners and main claimants**

The quantitative survey, conducted by British Market Research Bureau (BMRB), covered partners of main benefit claimants who were asked to attend a WFIP. In addition, short complementary interviews were conducted with the main benefit claimant in the same household as the partner whenever possible. The survey was conducted using face-to-face interviewing in respondents’ homes.

**Coverage**

Interviews with partners covered: household characteristics and demographics; experience of WFIP and NDP; overall perceptions of contact with Jobcentre Plus; work history and job characteristics; attitudes to work; and training undertaken.

The main claimant questionnaire included questions on working status/work history, and expectations and overall impressions of the WFIP (if the partner attended). The questions were generally the same as the ones asked to partners for the purposes of comparability.
Sample
The sample was designed to be representative of all partners who were asked to attend a WFIP between October 2004 and January 2005. It included both WFIP attendees and non-attendees. The sample file was drawn from the DWP database of partners eligible for WFIP. A total of 3,786 interviews were achieved from the survey, with a response rate of 73 per cent. Fieldwork took place between April and July 2005.


1.3.3 Impact assessment
The impact assessment was conducted by the Policy Studies Institute (PSI). This work examined:

• movement off benefit, as a result of eligibility for and participation in WFIP and NDP;

• movement onto NDP, overall and as a result of WFIP participation.

The impact estimates were produced using two alternative strategies:

• Difference-in-differences (DiD) estimates, based on a comparison of changes before and after the introduction of the intervention among those eligible to participate with similar changes among those not eligible to participate

• Instrumental variable (IV) estimates. These exploit the fact that stock records were downloaded to the Labour Market System (LMS) over a two-month period and the order of download was determined by a random number. Since the timing of download affects the probability of participating in WFIP, but does not affect outcomes, this allows the impact of WFIP participation to be identified.


1.3.4 Cost benefit analysis
The NDP/WFIP Cost Benefit Analysis was carried out internally at the DWP. It was conducted for the period April 2005 to March 2006 using additionality estimates from a similar period.
1.4 Synthesis report

This report brings together the findings from the different strands of the evaluation. It provides a succinct assessment of the programme, with a particular emphasis on:

- overall impact of WFIP/enhanced NDP on partners and main claimants;
- elements of the programme that were more/less successful;
- sub-groups that benefited more/less from participation;
- potential options for future direction.

1.5 Interpretation of findings

When interpreting the research findings, the following issues should be borne in mind:

- Both the qualitative and quantitative research was based on partners eligible for or attending a WFIP at a particular point in time. The circumstances of the individuals concerned, and the service provided, may be affected by the specific timing of the interviews.

- Partners and main claimants were interviewed some time after being invited to attend a WFIP. As a result, their answers are influenced by their recall of events, which may or may not be accurate. In particular, some respondents had difficulty recalling the precise details of their discussions with Jobcentre Plus staff.
2 Partner characteristics

Summary

- Partners are extremely diverse in terms of their circumstances and barriers to work. Addressing these concerns is complicated by the need to understand partners’ circumstances alongside that of the main claimant.

- The majority of partners were not looking for work at the time of their Work Focused Interviews for Partners (WFIP) and often did not see any prospect of working in the short-term. Many had not worked for some time or at all.

- Where work was an option, most partners were looking to work part-time. This, combined with the fact that it was very rare for both partners to work at the same time, meant that work often did not improve the couple’s financial position.

- Among couples with children, the age of the youngest child was the key factor in determining work prospects. Partners were generally reluctant to consider formal childcare.

- Substantial proportions of partners had health problems or disabilities, and/or caring responsibilities (most commonly for the main claimant). These were often major barriers to work (often affecting both the partner and main claimant).

This chapter provides a descriptive analysis of personal and household characteristics of partners. This enables a greater understanding of this customer group and the issues many face when returning to the labour market, and the implications this has for helping them into or towards employment.

It should be noted that unless otherwise stated, this analysis relates to partners invited to a WFIP, i.e. the eligible population of partners as a whole, rather than those who attended a WFIP and/or New Deal for Partners (NDP) interview.
2.1 Overview

Partners form a highly diverse and heterogeneous Jobcentre Plus customer group. By virtue of their relationship to the main claimant, they are perhaps less easy to categorise or generalise about than most customers.

Within the overall sample there was a significant number of partners who faced at least one potential barrier to work, most commonly health problems or disabilities, childcare or other caring responsibilities. Only a relatively small proportion of partners in the sample did not face any major barriers when considering work options. Some partners faced multiple barriers that made it more difficult for them to work, for example both a health problem and a caring responsibility that restricted the type or amount of work they could do.

2.2 Household perspective

Rarely was it possible to understand partners’ expressed constraints in isolation without reference to the main claimant and their household as a whole. Partners’ decisions about work were tied up with the effects on the other person’s benefits, and were affected by consideration of the potential impact, both on them individually and on the household.

The qualitative research noted many strong similarities within couples as regards levels of education, types of work experience, and expectations for the future. One consequence of this was a high degree of similarity between the difficulties and barriers perceived by partners and by main claimants. For example, basic skills needs and literacy or learning difficulties were often evident in both members of a couple.

Set patterns of behaviour, which present a challenge to advisers even in relation to individuals (for example, long-term stock claimants), are arguably even more difficult to influence with partners. This is because they inextricably involve both members of a couple and have been established over time and ‘negotiated’ by couples to meet their joint situation. This is a key element of what makes up the ‘difficult to help’ nature of the partner client group.

The effects of this ‘couple dynamic’, experienced by advisers and observed in the qualitative interviews with partners and claimants, varied widely in both intensity and obviousness. In some cases, the relationship enabled mutual support. In other cases, however, relationships were based on a marked inequality of power between the individuals, with one person dominating the couple and essentially imposing their views and preferences on the other.
2.3 Claim details

2.3.1 Benefit type

Partners of clients claiming Jobseeker’s Allowance (JSA), Incapacity Benefit (IB), Income Support (IS) or Severe Disablement Allowance (SDA) are eligible for a mandatory WFIP. Analysis of administrative data covering the period 12 April to 30 September 2004 showed that a total of 465,638 partners would have been eligible for a WFIP if the programme had been introduced nationwide. However, WFIP had only been introduced in areas that had converted to Jobcentre Plus at that time, and as a result 247,419 partners of main claimants were eligible according to the Working Age Statistical Database (WASD). Details of the benefits claimed are shown in Table 2.1; this analysis was part of the impact assessment work carried out by the Policy Studies Institute (PSI).

Table 2.1 Partners eligible for WFIP by main claimant's type of benefit (administrative data)

<table>
<thead>
<tr>
<th>Categories</th>
<th>Per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>JSA</td>
<td>22</td>
</tr>
<tr>
<td>IS</td>
<td>56</td>
</tr>
<tr>
<td>IB</td>
<td>22</td>
</tr>
<tr>
<td>SDA</td>
<td>1</td>
</tr>
</tbody>
</table>

Base: Eligible claims in Jobcentre Plus areas (182,504).

Survey data showed that partners of JSA claimants were more likely to be younger and to have children, particularly younger children aged under nine. By definition, partners of JSA claimants (with the exception of older couples) had dependent children (otherwise they would be required to make a joint claim for JSA). Partly for this reason, and partly because of the job search requirements of claiming JSA they were also rather more likely to cite childcare as their main barrier to work than were the partners of other benefit claimants.

Partners of IS claimants were more likely than others to be male and not to have any children. Partners of both IS and IB claimants also to some extent reflected the nature of the main benefit recipients’ claims. IS cases included situations of disability and sickness alongside shortfalls in National Insurance contributions that would otherwise allow an IB claim to be made. For this reason, IS claimants were less likely to have extensive work histories than IB claimants, and could thus be considered more difficult to help.

Partners of IB claimants were more likely to be in work (part-time) at the time of the WFIP. They also tended to be slightly older than other partners. This correlated with the fact that a much higher proportion of IB couples were ‘stock’ cases with longer-term claims. For partners of IB customers generally, factors allowing consideration of work included their children getting older and improvements in the main claimants’ health, whereas their main constraints included lengthy absence from the labour
market and the management of their own health conditions. Indeed, advisers saw much in common between the needs of IB customers and many in the partners customer group. Particular mention was made of the enhanced adviser training that some IB advisers had received in new questioning techniques that were felt would be appropriate to many partners.

2.3.2 Stock and flow

Main benefit claimants are categorised as being either stock or flow customers depending on the length of time they have been claiming benefits. At the time of the quantitative survey, partners of stock customers represented 58 per cent of the total sample and flow customers represented 42 per cent. Analysis of administrative data showed that many customers had a long claim duration (38 per cent of all eligible cases had an associated claim of five years or more).

JSA partners were predominantly flow customers. Partners in this group were younger than average, and were most likely to be looking for work at the time of the WFIP. Non-JSA partners (IS and IB customers) were mostly stock customers. Partners of stock customers were more likely to be in (part-time) work at the time of the WFIP.

2.4 Employment background

2.4.1 Economic status

A small minority of partners (eight per cent) said they were in work at the time of the WFIP, and most confirmed that this work was less than 16 hours per week. Partners were most likely to say their main activity was looking after children or the home (39 per cent) or caring for someone who is sick or disabled (25 per cent).

One in eight partners (13 per cent) said they were looking for work at the time of the WFIP. The majority of partners (78 per cent) said they were not looking for work.

It was very unusual for both partners to be in work at the same time. When partners were interviewed for the quantitative survey (after they had been invited to or attended a WFIP), in only one per cent of cases were both the main claimant and partner in paid work. The qualitative research found that these instances were often the result of main claimants getting involved in small ways with the running of their partner’s self-employed business.

There was a clear distinction in the circumstances of households where one of the partners only was in work, as identified in the quantitative survey:

- If the main claimant was in work, the partner was likely to be looking after the children or home (in 67 per cent of cases).
- In cases where only the partner was in work, the main claimant was likely to be permanently sick or disabled (63 per cent).
- In addition, main claimants were more likely than partners to be working full-time. This is related to differences by gender, discussed in Section 2.8.1.
2.4.2 Work experience

Partners and main claimants in the quantitative survey were asked when they were last in paid employment. These results are shown in Table 2.2, indicating a similar pattern for both main claimants and partners, including a long absence from work in many cases.

The qualitative research found that many of those who had never worked either had learning difficulties and/or basic skills needs, or were young parents with babies or toddlers.

Table 2.2 Length of time since last in a paid job: quantitative survey

<table>
<thead>
<tr>
<th></th>
<th>Partner</th>
<th>Main claimant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working at or since WFIP</td>
<td>13</td>
<td>9</td>
</tr>
<tr>
<td>Up to a year ago</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>One year – up to two years ago</td>
<td>6</td>
<td>13</td>
</tr>
<tr>
<td>Two years – up to five years ago</td>
<td>16</td>
<td>19</td>
</tr>
<tr>
<td>Five or more years ago</td>
<td>46</td>
<td>47</td>
</tr>
<tr>
<td>Never worked</td>
<td>16</td>
<td>6</td>
</tr>
</tbody>
</table>

*Base: All partners and main claimants 3,785 3,257*

The most common reason given by partners for leaving their last paid job was to have a baby (mentioned by 29 per cent in the quantitative survey).

2.5 Barriers to work

The qualitative research identified three groups of partners, in terms of barriers to work:

- First there were those who perceived difficulties in finding suitable jobs in the local labour market, because of low pay levels, the seasonal or insecure nature of work, or inflexible and unsuitable hours.

- Secondly, there were those who cited a lack of relevant skills, qualifications and work experience.

- Thirdly were those partners who could see no financial gain from working. This was either because of a perception that the partner’s earnings would adversely affect the claimant’s (and household) income, or the view that remaining on benefits would achieve a better quality of life than working.

More detail is provided in Table 2.3; respondents were prompted with these items in the quantitative interview and asked which applied to them. Section 2.8 looks in more detail at barriers relating to personal characteristics and circumstances (such as illnesses and disabilities, as well as caring responsibilities).
Table 2.3  Specific barriers to work

<table>
<thead>
<tr>
<th>Categories</th>
<th>Per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>I need to be very flexible with the hours I work</td>
<td>31</td>
</tr>
<tr>
<td>I haven’t got enough qualifications and experience to find the right work</td>
<td>29</td>
</tr>
<tr>
<td>I think I would be worse off financially if I started work</td>
<td>25</td>
</tr>
<tr>
<td>It’s difficult to find the type of work that would suit me</td>
<td>19</td>
</tr>
<tr>
<td>There aren’t enough opportunities locally for people like me</td>
<td>15</td>
</tr>
<tr>
<td>My confidence about working is low</td>
<td>14</td>
</tr>
<tr>
<td>I have worries about leaving benefit</td>
<td>14</td>
</tr>
<tr>
<td>Travelling to work would be difficult</td>
<td>13</td>
</tr>
<tr>
<td>I’m unlikely to get a job because of my health problems</td>
<td>13</td>
</tr>
<tr>
<td>I’m unlikely to get a job because of my age</td>
<td>11</td>
</tr>
<tr>
<td>I couldn’t get the sort of work I would want</td>
<td>10</td>
</tr>
<tr>
<td>I can’t afford the cost of transport to get to work</td>
<td>7</td>
</tr>
<tr>
<td>My partner/family doesn’t want me to work</td>
<td>7</td>
</tr>
</tbody>
</table>

*Base: All partners except if too ill/disabled to work again (3,280).*

2.6  Working in the future

Table 2.4 shows that, while the majority of partners were not looking for work, many said they would like to work in the future. Views on whether the respondent wanted to work in the future appear to be driven by age. Among those aged under 35, only 16 per cent said they did not want to or could not work again, whereas among those aged 50 or over, 61 per cent said they did not want to work again.

Table 2.4  Work status at survey interview

<table>
<thead>
<tr>
<th>Categories</th>
<th>Per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working</td>
<td>10</td>
</tr>
<tr>
<td>Looking for work</td>
<td>12</td>
</tr>
<tr>
<td>Not working or looking for work</td>
<td>78</td>
</tr>
<tr>
<td>(-) want to work in the future</td>
<td>46</td>
</tr>
<tr>
<td>(-) do not want to/cannot work in the future</td>
<td>32</td>
</tr>
</tbody>
</table>

*Base: All partners invited to a WFIP (3,785).*

Partners who were not looking for work at the time of the survey, but who said that they did want to work in the future, were asked how long they expected it to be before they started looking for a paid job. While most partners have positive attitudes towards work (as shown in Section 2.7), the timescales for moving into work may be long: only 32 per cent expected to start looking for work in the next two years, and the same proportion were unable to specify a timeframe. Partners interviewed in the qualitative research said that longer-term prospects for work
typically depended on an improvement in their own or their partner’s health, or the opportunity they hoped would be provided when their youngest child reached school age.

Most work undertaken by partners was part-time, and this also applied to work they expected to do in the future. This general pattern applied to those with health problems or disabilities, as well as to those with barriers relating to childcare or caring responsibilities.

2.7 Attitudes to work and benefits

Both the main claimant and partner were asked whether they agreed or disagreed with a number of statements about work and benefits. The results are shown in Table 2.5.

The findings show that most respondents had a generally positive view of the role of work, and saw it as preferable to being on benefits. This confirms that, as stated elsewhere in this report, it is personal and household circumstances which tend to restrict respondents’ ability to work, rather than attitudes. For example, the majority of main claimants and partners agreed that having almost any job is better than being unemployed, and that once you have a job it’s important to hang on to it, even if you don’t really like it. This was re-iterated in the qualitative interviews, in which most partners said that they would like to work but were constrained by the various barriers they faced. Having said this, there is a group of respondents, representing around a quarter of the sample, who were less likely to see work as important, by disagreeing with these statements, or by agreeing that it is not worth working while receiving benefits.

This confirms that there is a group of partners who either had a negative view of work or (as shown in Section 2.6) did not see any possibility of work at any point in the future. While WFIPs can help to challenge these preconceptions, they also need to be able to distinguish these partners from those who are currently unable to work but may be able to do so in the future.

The figures for the main claimant and partner were quite similar on these issues, although main claimants were more likely to see the importance of work relative to benefits (for example 22 per cent of main claimants agreed that it is not worth working while receiving benefits, compared with 30 per cent of partners).
Table 2.5  **Attitudes to work and benefits (selected statements only)**

<table>
<thead>
<tr>
<th>Column percentages</th>
<th>Per cent that agree with each statement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Partner</td>
</tr>
<tr>
<td>It would not be worth me working while I am/we are receiving benefit</td>
<td>30</td>
</tr>
<tr>
<td>Once you've got a job, it's important to hang on to it, even if you don't really like it</td>
<td>56</td>
</tr>
<tr>
<td>Having almost any job is better than being unemployed</td>
<td>57</td>
</tr>
<tr>
<td>I would only work if my partner was in work</td>
<td>11</td>
</tr>
<tr>
<td>Having a job is the best way for a woman to be an independent person</td>
<td>60</td>
</tr>
</tbody>
</table>

*Base: All cases where both main claimant and partner took part in survey, excluding those too ill or disabled to work again (1,601).*

### 2.8 Key sub-groups

This section examines different key sub-groups within the overall total partner population.

#### 2.8.1 Partners with dependent children

Table 2.6 shows the number of children in the household, according to administrative data. Over half of households (57 per cent) contained at least one child.

Table 2.6  **Partners eligible for WFIP by number of children (administrative data)**

<table>
<thead>
<tr>
<th>Categories</th>
<th>Per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>No children</td>
<td>43</td>
</tr>
<tr>
<td>One</td>
<td>20</td>
</tr>
<tr>
<td>Two</td>
<td>19</td>
</tr>
<tr>
<td>Three or more</td>
<td>18</td>
</tr>
</tbody>
</table>

*Base: Eligible claims in Jobcentre Plus areas (182,504).*

The qualitative research found that the age of the youngest child was important in relation to work expectations and aspirations. Those with a youngest child aged under five years tended to see childcare as the single most significant barrier to work that they faced, but were also likely to view this as a temporary difficulty. Although none of the partners with very young children were currently working, they tended to have more recent work experience than other partners. Many said that they did
not wish to work yet, but intended to work again in the near future when they felt that the age of their child would allow it.

Many of the partners with children aged five years or over had been working part-time prior to their WFIP, or had started to work since. However, others had been out of the labour market for a relatively long time (typically five to ten years). Those who had not worked for even longer (15 to 25 years) included a high proportion of partners who said that they had made the choice not to work, often to look after children, and did not wish to change this.

**Current or future childcare arrangements**

As shown in table 2.7, just over half of partners who were in work at the time of the interview, and who had children aged 18 or under, said they had some form of childcare arrangement, and in almost all of these cases it was their current partner (the main benefit claimant) that looked after them. **Just three per cent said that they used formal childcare (i.e. outside of the household, family or friends), and in a separate question four per cent said that they paid for childcare.**

A similar picture is evident when the question is broadened to include partners who were not in work, when asked which childcare options they would consider (also shown in Table 2.7). Again, there was a widespread reluctance to consider formal childcare (only seven per cent would consider ‘other’ childcare), although this was a little higher (nine per cent) among those with a youngest child aged under nine. The qualitative research also found a lack of trust in, and reluctance to use, formal childcare.

This suggests that it may be problematic for both the main claimant and partner to be in paid work without changing attitudes to the use of paid childcare. As noted earlier in the chapter, it is currently very unusual for both partners to be in work at the same time.

**Table 2.7  Current childcare arrangements/arrangements that partners would consider**

<table>
<thead>
<tr>
<th>Column percentages</th>
<th>Current use per cent</th>
<th>Would consider per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave with current partner</td>
<td>48</td>
<td>20</td>
</tr>
<tr>
<td>Leave with other family member or friend</td>
<td>7</td>
<td>12</td>
</tr>
<tr>
<td>Only work during school hours</td>
<td>26</td>
<td>50</td>
</tr>
<tr>
<td>Leave them at home – old enough to look after themselves</td>
<td>17</td>
<td>12</td>
</tr>
<tr>
<td>Take them to work</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Work from home</td>
<td>3</td>
<td>23</td>
</tr>
<tr>
<td>Use other (e.g. formal) childcare</td>
<td>3</td>
<td>9</td>
</tr>
</tbody>
</table>

*Base: All currently working, and with children aged 18 or under (251); all partners with children expressing an opinion, except if too ill/disabled to work again (1,849).*
Overall, workless couple households are known to account for a substantial proportion (19 per cent) of children living in poverty. WFIPs for partners and the enhanced NDP programme were set up with the expectation that the impact they had on increasing the numbers of partners moving into paid employment would also benefit any dependent children in those households and thus contribute to meeting the national target for reducing child poverty. An assumption was made that partners with children, would in many cases, share similar characteristics and face similar barriers to working as lone parents, and perhaps even be easier to move into employment as there would potentially be a second adult in the household who might be able to take on childcare and free the other partner for work.

The evaluation has shown that this is not the case. As the age of couples increased, so too did the frequency of other caring responsibilities and both the frequency and severity of health conditions among partners and main claimants alike. Despite children being settled in secondary school, or even having grown up and left home, therefore, partners still felt themselves highly constrained in their opportunities to consider paid work. Partners in many cases appear to share characteristics and circumstances more with IB customers than with lone parents, and to require a similar type of approach as these customers.

2.8.2 Health/disability

In the quantitative survey, almost two fifths of partners (39 per cent) described themselves as having a longstanding illness, condition or disability. A slightly smaller proportion (29 per cent) said that their condition affected the type or amount of work they could do. This included one in eight (13 per cent) partners who said that they were too ill to work again.

Overall, those with a health problem or disability were less likely than average to be looking for work at the time of the WFIP, and tended to have spent a longer time than average out of the labour market.

As is often the case, there is a link between age and health problems/disabilities, with older partners much more likely to have a health problem or disability (62 per cent of those aged 50 or above compared with 17 per cent of those aged under 25). Over and above this age pattern, non-JSA and stock partners were more likely to have a health problem, with long-term stock partners being particularly likely to do so.

The qualitative research reported that in a number of cases, the health problems of partners could be seen to be a consequence of the underlying problem that had led to the claim being made by the claimant. This was particularly evident in relation to mental health conditions. In several cases, a situation of redundancy for the claimant, or the crisis in their health that had led to them having to leave work, had

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put such a strain on their partners as to precipitate a breakdown in their health also. Varying degrees of anxiety and a range of mental health conditions among partners were thus not uncommon.

Frequently, therefore, households were in a position of ‘suspended activity’ waiting upon health improvements either for the main claimant or the partner or for both individuals in the couple. Thus many partners said that they wished to work in the future but could not consider it in the short or medium-term.

2.8.3 Caring responsibilities

In the quantitative interview, partners were asked whether they provided care, help or support for anyone because of illness, disability, old age or infirmity of any kind. Just over one-half (51 per cent) of partners said they did have a caring responsibility. As with health problems or disabilities, a slightly lower proportion overall (43 per cent) said that their caring role affected the type or amount of work they can do.

Those with a caring responsibility were less likely than average to be looking for work at the time of the WFIP, and tended to have spent a longer time than average out of the labour market.

Partners who were more likely to have a caring commitment included:

- non-JSA stock customers;
- those who were older;
- those without children under 18.

The vast majority of partners with caring responsibilities were caring for the main claimant, rather than carers of other relatives such as elderly parents or children with disabilities or severe health or behavioural problems.

Caring responsibilities for the main claimant was often seen as effectively removing both individuals in the couple from work. The demands of caring on partners tended not to be constant or full-time (over twenty hours of essential care per week would qualify them for Carers Allowance). However, many customers’ health conditions were said to make unpredictable and intermittent demands for care input from partners. These irregular demands were hard to plan for, or to manage, and had an effect on partners’ availability for work that might seem disproportionate to the actual time involved. Partners in this position could only anticipate being able to work if they could find an extremely understanding and flexible employer.

Where the partner was caring for the main claimant, this situation lay at the heart of the ‘couple dynamic’ underlying behaviour and attitudes. The need for caring and the demands this placed on partners were thus intimately tied into couples’ personal and household situations and frequently had become a difficult issue within relationships. Furthermore, for a substantial proportion of carer partners the demands of caring had affected their own health, creating further barriers to employment. Resultant problems ranged from dented self-confidence and low self-esteem through to depression and other mental health conditions.
In addition, indications of resentment and guilt were apparent in some cases though many described more low-level tensions and conflict in their relationships. Sometimes these tensions were ascribed to the simple fact of having to spend a lot of time inactive together in the home. The frustrations clearly felt by many (partners and main claimants alike) often underlay a strong desire to return to work, coupled with a sense of being trapped within a situation over which they had little control and which left them with few choices. Several partners displayed great unease at expressing their dissatisfaction with their caring role but admitted that a major component in their wish to work was a desire to ‘escape’ from their domestic situation.

**Current or future arrangements when in work**

Those in work and with caring responsibilities were most likely to say that the person they cared for did not need care while they were at work (see Table 2.8). A quarter of those not currently in work also said that they would not expect anyone else to provide care if they were to start work. This indicates either that the working hours currently (or would need to) fit around the caring commitments, or that the caring responsibility does/would not affect the respondent’s ability to work. In this context, it is worth noting that the majority of partners with caring responsibilities said they could not work more than 16 hours per week.

<table>
<thead>
<tr>
<th>Table 2.8</th>
<th>Current caring arrangements/arrangements would consider</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Column percentages</strong></td>
<td><strong>Current per cent</strong></td>
</tr>
<tr>
<td>Does not need care while I am at work</td>
<td>58</td>
</tr>
<tr>
<td>Other household member takes on caring</td>
<td>16</td>
</tr>
<tr>
<td>Other relative or friend (outside the household) takes on caring</td>
<td>14</td>
</tr>
<tr>
<td>Respite care provided by local authority/NHS</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
</tr>
</tbody>
</table>

*Base: All currently working, and caring for someone (166); all with caring responsibility expressing an opinion (1183).*

In the qualitative interviews, some couples were contemplating the complex arrangements needed to enable the partner to work while juggling their caring responsibilities. Examples included consideration of night shifts, self-employment and weekend work, calling on the help of friends and neighbours for respite care as necessary. Few couples interviewed had managed to put any such strategies into practice however.
2.8.4 Ethnic minority partners and partners whose first language is not English

Seventeen per cent of partners were from a minority ethnic background, and nearly one-fifth (18 per cent) of partners said that English was not their first language. As expected, there is a strong link between language and ethnicity. Close to nine in ten (88 per cent) minority ethnic partners did not have English as their first language.

Those whose first language was not English were less likely than average to be looking for work at the time of the WFIP, and more likely than average to have never worked. Lack of qualifications and experience were cited as a barrier to work more frequently than average by this group.

Partners (and main claimants) whose first language was not English were more likely to agree that important decisions should be made by the man rather than the woman (30 per cent of partners agreed with this), and that a woman who does not have to work should not work (44 per cent agreed).

2.8.5 Older partners

In the quantitative survey, 21 per cent of partners were aged 50 or over. Older partners were disproportionately likely to be partners of IB claimants. As is generally the case, the incidence of health problems or disabilities was higher among those aged 50 or over, and these partners were less likely than average to have qualifications.

As well as the key sub-groups, the research also looked at the gender profile of the customer group, as well as partners with literacy and numeracy problems.

2.8.6 Gender

As might be expected, the partners of main benefit claimants were predominately female (80 per cent). Women were more likely than men to be in (part-time) work at the time of the WFIP. However, men were more likely to be looking for work, and (if not currently working) were more likely to have had recent experience of work. Women were more likely than men to say they had insufficient qualifications or experience to find the right work.

In the qualitative research, there was much evidence that traditional gender roles of male ‘breadwinner’ and female ‘home-maker’ still exert a strong influence over many couples. When asked what their ‘ideal’ household situation would be as regards working, both partners and claimants frequently answered that they would want the man to work full-time and the woman to look after the home and children. However, in the majority of cases – where the partner was the woman – this distribution of roles was extremely difficult to achieve due, for example, to the claimants’ ill-health. Contemplating work for the partner was tantamount to reversing the model entirely. While the female partner was not working, the male claimant bringing benefits into the household was able to remain the main ‘breadwinner’.
2.8.7 Literacy and numeracy problems

In total, close to a quarter (23 per cent) of partners said that they had had problems with reading, writing or speaking English since the age of 16. This group comprised 14 per cent whose first language was not English and eight per cent who did have English as their main language.

One in ten (10 per cent) partners considered themselves to have had problems with numeracy since the age of 16.
3 Work Focused Interviews for Partners

Summary

- Advisers felt that that Work Focused Interviews for Partners (WFIPs) had a low status among managers, with limited training provided.

- Some advisers felt that more partners should be waived or deferred, and some argued for a preliminary sift of partners, to exclude those for whom a WFIP would not be appropriate.

- Partners had mostly positive views of joint interviews. Advisers’ views were mixed, with some acknowledging that they were more comfortable with a one-to-one interview approach.

- Most partners felt that it was not the right time to have a WFIP, although the majority found it at least quite helpful.

- A Better Off Calculation (BOC) was often seen as the most valuable tool available to advisers, although this was mostly used in a follow-up interview rather than the initial WFIP. Results of BOCs tended to be most positive for those with children, but many found they would not be better off financially in work (this applied to carers in particular).

- WFIPs appeared to work best for partners of Jobseeker’s Allowance (JSA) claimants, but to be more problematic for partners of Income Support (IS) and Incapacity Benefit (IB) claimants, especially those with health problems or disabilities and carers.

The purpose of a WFIP is to engage customers in a discussion about work prospects, their experience and skills, barriers to work and how best to tackle them. Part of its role is to encourage customers into ‘caseloding’ (ongoing help towards work), which includes New Deal for Partners (NDP); also for advisers to ascertain propensity to work and whether referral to a specialist adviser is appropriate. This chapter reports on the delivery of WFIPs, their content and their perceived effectiveness.
3.1 WFIP administration

In all of the case-study districts covered by the qualitative research, the administration of WFIPs was being handled alongside that for lone parents. However, WFIP administration frequently appeared to be accorded a much lower priority. This was partly because of the smaller numbers involved, and partly because it was not given any great status by managers: the assumption appeared to be widely made by managers that there was nothing unique about dealing with partners that meant WFIPs could not be carried out by more or less any adviser who had the required capacity. This was the exact opposite of the view of many advisers, however:

‘It’s such a difficult client group that you really need more experience before you do it.’

(Adviser)

In general, training for administrative staff was highly variable across the five districts. Some staff talked of a full day’s training and good back up for queries on the job, while others reported that they had had no training at all or that it was ‘very, very basic’.

Advisers’ views of partners were frequently affected by the types of customers and programmes they had hitherto dealt with. One consequence of this was that nearly all advisers were unfamiliar with at least some aspects of the work with partners, especially in the early months of the initiative – a factor which may have contributed to negative attitudes towards the client group. A number of advisers felt sufficiently unsure about aspects of IB claims and eligibility conditions to have asked for specific training in this area. One adviser admitted that initially she would not carry out a BOC for a partner of an IB claimant because she could not be sure it would be correct.

In the early months of the WFIP initiative, several districts had looked to concentrate partners work among a limited number of advisers with particular backgrounds or familiarity with those customer groups assumed to have most in common with partners. However, by the second phase of the qualitative fieldwork there was a clear trend away from anything that might be considered as creating ‘specialist partner advisers’. Not only was work with partners being ‘spread around’ among a greater number of advisers and assigned to advisers with a wider range of backgrounds and customer group responsibilities, but it was also being made the responsibility of ‘non-New Deal’ staff, with interviews being picked up, for example, by new claims advisers.

The increasingly small numbers of WFIPs coming through the system was one reason given for this marginalisation as it had become an ever smaller portion of offices’ workloads. With no critical mass to justify lending partners work any real sense of priority, there was an increasing tendency to fit it in around other priorities in what could be a rather ad-hoc fashion. A lack of training specifically related to the needs of partners was seen as reinforcing this.
3.2 Adviser views of WFIPs

3.2.1 Advisers’ perceptions of partners

Within the whole client group, the household factors tying partners to claimants were seen by advisers as increasing problems and constraints, with the result that partners were seen as not just a varied group, but an intrinsically complex one too. In the first phase of qualitative research, for some advisers this was a challenge to be relished, while for others it rendered the client group a frustrating and time-consuming prospect, with little chance of delivering any job outcomes. Those holding the latter attitude to partners focused strongly on short-term job outcomes and making judgements about the amount of time and effort required with different customers to achieve these ends.

Those with the more positive viewpoint took a broad interpretation of their role, emphasising that with partners ‘you need time’ and generally need to focus on the medium to long-term, rather than immediate job entry: advisers taking this approach admitted to having had very few job outcomes, if any. However, they pointed to numbers of partners on case loads, undertaking training and maintaining contact with their adviser as evidence that job outcomes were likely to be achieved further down the line.

In addition to the perception among some advisers that partners were a difficult and complex group, some advisers carried over negative views of the customer group from previous experience of New Deal for Partners of Unemployed People (the predecessor to NDP). Several lone parent advisers negatively contrasted partners with lone parents in terms of their willingness to seek help and enter employment. In addition, partners of IS and IB claimants predominated among those called to WFIPs in the first six months of the programme, and they therefore tended to dominate advisers’ perceptions of the client group.

In many cases, advisers felt the specific problems associated with relationships, medical and mental health conditions and caring responsibilities to extend beyond their remit and their training. Issues relating to couple and household complexities were acknowledged as being ‘deep and difficult problems’ but advisers had few, if any, strategies for dealing with them.

3.2.2 Delivery constraints

By the time of the second phase of qualitative research, positive views were much harder to find, as a result of advisers having achieved so little in the way of success. The general context of delivery was felt to be more pressured, restricting the space and time available for serious engagement and advisers in some areas felt that their own jobs were under threat. Advisers in a number of districts were reported to be seriously demoralised by this.

Increased and extended targets relating to all customer groups were said to have removed any incentive that may have previously existed for advisers to engage with
partners. Jobcentre Plus’ devolved management arrangements were also said to have reduced the focus on particular customers groups and placed greater emphasis on delivering Jobcentre Plus business ‘in the round’.

Work with partners, therefore, appeared to have been given an even lower priority than it had been given a year before. The small number of customers being dealt with continued to contribute to this low priority and was being accentuated by a general trend away from adviser ‘specialisation’. Not only were the numbers of WFIPs being conducted falling (due to stock customers receiving WFIPs and thus the customer base naturally decreasing), but those that were coming through were being allocated to a greater number of advisers in most offices, further reducing the chances for any individual adviser to build specific expertise in relation to the customer group.

The continued reductions in time slots for WFIPs – both as a result of policy change and operational practice – appeared to be further compounding the problem. The latter was also clearly a reflection of the perceived low priority accorded to the customer group. It had become accepted normal practice in many offices explicitly to seek to minimize the amount of time spent on WFIPs and to ‘rush through’ those partners not immediately expressing an interest in working.

In most districts, work with partners was being allocated to advisers only after other, higher priority customers had been dealt with, reinforcing negative perceptions of the partners, customer group and dissipating any expertise that may otherwise have developed. Perhaps not surprisingly, this perception of WFIPs meant that there was no evidence of strategic thinking about partners or about how partners’ specific needs might be addressed. Where efforts were being made they were directed towards finding ways of ‘processing’ the customer group quickly rather than towards seeking ways of making WFIPs more effective in terms of NDP entries or job outcomes.

### 3.2.3 Sifting or screening

There was considerable support from some advisers for the idea of carrying out a preliminary ‘sifting’ or ‘screening’ process with partners. The purpose of such a sift, as they saw it, would be to remove from the body of partners receiving a full WFIP those for whom it could be judged that such an interview would be of no value.

The process was envisaged as an extended waiver and deferral procedure. In addition to identifying ‘missed’ waivers and deferrals which are currently getting through to WFIP appointments with advisers and having to be dealt with face-to-face, it would provide a short preliminary exploration of circumstances, barriers and attitudes to working. On the basis of this, it could then be decided which customers should proceed to a full WFIP and which did not need matters to be taken further. The strong implication was that a majority of the client group would be screened out in this way, allowing advisers more time to deal with those who would benefit the most.
The issue for advisers who advocated some form of sifting process was to minimise unproductive effort, as they saw most WFIPs as a ‘waste of time’ because of partners’ perceived insurmountable barriers or wish not to work. Advisers who were most focused on short-term job outcomes and feeling most under pressure to achieve job targets were also the keenest advocates of some form of screening. They argued that not only did partners typically require more intense, lengthy support to get them into work than other customers, but that even if a job outcome was attained it was worth only eight points towards targets (compared with 12 points, for example, for a lone parent job outcome). One adviser went so far as to describe WFIPs as ‘undermining’ the achievement of job targets with other customers.

There would be a danger that low expectations of the partners’ client group could become a self-fulfilling prophecy if a quick sift removed all but those expressing an immediate wish to join NDP. A further concern would be the elimination of any ‘grey area’ between the two types of partners. Arguably, this ‘grey area’ of undecided, persuadable partners and those willing to look further into future possibilities and options rather than immediate ones, is where much of the impact from WFIPs could be achieved. Certainly, the idea of screening was least popular with advisers who had positive views of the client group’s potential.

3.3 Attendance at WFIPs

The sample for the quantitative survey comprised partners who had been asked to attend a WFIP between October 2004 and January 2005. By the time of the survey interview (four to six months later), 79 per cent had attended a WFIP. Non-attendees comprised three per cent who had their WFIP meeting waived, two per cent whose meeting was deferred and 17 per cent who had failed to attend or participate.

The main reasons given for non-attendance suggest two broad groups: those who had problems preventing them from attending (e.g. illness, caring or childcare responsibilities), and those who were in work or felt they did not need to attend.

Analysis of the key sub-groups reveals that partners who were more likely to have attended included:

- IS and stock customers – consequently, attendance was highest amongst non-JSA stock;
- those with a caring responsibility.

These findings are linked to reactions to the initial invitation letter. Carers and partners of stock customers noted the strong wording of the letter, informing them of the mandatory nature of the WFIP. This is likely to have caused higher attendance rates amongst these partners.
3.4 The deferral/waiver system

In almost all districts, the waiver/deferral process was purely reactive. Advisers would make such decisions on the basis of telephone conversations with customers. However, advisers would wait to be contacted, and for partners to raise the issue of whether a WFIP was appropriate or possible for them, before engaging and making a decision. The same applied in those districts where administrative staff were making some telephone contact with partners. Only if customers themselves raised the issue of possible grounds for waiver or deferral was the suggestion then made that they contact an adviser to discuss it, with the adviser informed accordingly to expect a call.

Terminal illness of either the claimant or partner was a universally recognised criterion for waiver or deferral. Case-by-case judgements were required for those partners with serious health problems of their own or in the household, or those with a round-the-clock requirement to care for a claimant. Waiver and deferral criteria for partners were said to be essentially the same as for other WFIGs, and advisers were comfortable about making those decisions.

Most advisers had made very few waivers or deferrals and some none at all. In most offices, the perceived policy line was that partners should attend at the Jobcentre Plus office if at all possible and get to see the new Jobcentre Plus environment. In part because the reasons for a partner’s inability to attend were often related to the claimant’s health rather than their own, advisers preferred to defer WFIPs far more often than to waive them. Another adviser reported making deferral decisions (mostly on health grounds) in up to half of cases. Although this was exceptional, advisers were clearly using individual discretion in such decisions.

Some advisers felt that too many partners were being called in for WFIPs who should have been waived or deferred on the basis of their care commitments. Specifically, advisers pointed to the numbers of partners attending for WFIPs with serious illnesses or other problems, as evidence that the deferral and waiver system was not working well.

Other advisers described making waiver/deferral decisions ‘post arrival’ for partners whom they felt should never have been called in for a WFIP in the first place. There was some speculation as to why these partners were not requesting a waiver or deferral of their WFIP. Suggested reasons included fear of sanctions and the perceived strong wording of appointment letters. Another possibility was that having to make such a request without invitation or prompting was more ‘proactive’ than many customers with low confidence levels felt able to be.

3.5 Mode of delivery

Among partners who had attended a WFIP in the quantitative survey, the vast majority had their WFIP at a Jobcentre Plus office (97 per cent). Only one per cent had their WFIP over the phone, while less than one per cent had the WFIP in their home.
Three per cent of partner attendees in the quantitative survey had a group WFIP\textsuperscript{5}. One of the case study areas in the qualitative research confirmed that they had conducted group WFIPs. This was mainly for administrative convenience, although some advisers felt that group WFIPs had encouraged partners to move onto NDP, by helping to overcome feelings of isolation and lack of self-confidence. However, findings from the qualitative research suggest that group WFIPs may have been phased out over time.

### 3.6 Joint interviews

A high-level policy objective for WFIP and NDP is to reduce the number of workless households. Although the programmes are explicitly aimed at partners, it is possible for main claimants to become direct beneficiaries as a result of their partner’s involvement; main claimants may be made aware of work or training opportunities through their partner or by attending a joint WFIP. The purpose of joint meetings is to enable the adviser to consider the circumstances of the household as a whole.

Around two-fifths (38 per cent) of couples in the quantitative survey had a joint WFIP where both the partner and the main claimant attended. Sub-group differences indicate that the main claimant was more likely to accompany the partner either if attending the WFIP might prove useful for the main claimant (for example, couples were more likely to have a joint meeting if the main claimant was looking for work), or if the partner might be in need of assistance from the main claimant (for example, partners who were too ill to work again and those whose first language was not English were more likely to have joint interviews).

In the qualitative research, advisers also reported that many joint WFIPs happened for purely contingent reasons. Claimants attended primarily because they had given their partner a lift, or simply because they knew the location of the Jobcentre Plus office and their partner had never previously attended.

The qualitative research found that the message that WFIPs are relevant to both parties in a household (partner and claimant) did not appear to be getting through in many cases. Most advisers believed that claimants frequently viewed the appointment letter, addressed to their partner, as having nothing to do with them, and partners interpreted the possibility of joint attendance as a question simply of ‘moral support’ should they lack confidence. Interviews with partners and claimants confirmed that this was often the case.

However at phase two of the qualitative research, advisers perceived there to have been an increase over time in the proportion of partners attending their WFIs jointly with their main claimant partner. Suggested reasons why this might be the case included:

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\textsuperscript{5} Although some respondents may have had group WFIPs, it should be borne in mind that these are not recognised by DWP policy as official WFIPs.
• changes to the wording of letters to highlight and encourage joint attendance;
• the increased proportion of ‘flow’ WFIPs coming through in some areas, as ‘stock’ schedules were being successfully worked down (advisers felt that flow customers were more likely to attend WFIPS together as a couple, because, in comparison with ‘stock’ customers, they were seen as more likely to be nervous and feeling vulnerable in the early months of their claim).

3.7 Impact of lone/joint interviews

As outlined above, it is difficult to address partners’ barriers and work related issues in isolation from the main claimant’s circumstances and attitudes. This suggests that joint WFIPs should be encouraged, and partners who had attended a WFIP were generally positive: the majority thought it was helpful to have the main claimant present (89 per cent), with around two-thirds (64 per cent) saying it was very helpful. Only two percent of partners who attended a joint WFIP said that they would have preferred the main claimant not to have been present.

The main reason why partners found joint WFIPs helpful was that the main claimant was able to provide them with support. Other partners said that the main claimant helped them with interpretation of English, could provide detailed information on the couple’s circumstances, and that it allowed them to answer the adviser’s questions together from a joint perspective.

However, advisers held mixed views on joint WFIPs, and could often see both positive and negative aspects to them compared with interviews just with the partner. On the positive side, advisers said that joint WFIPs:
• provided the opportunity to address the claimant’s issues as well and offer them help too;
• allowed for household issues and income to be better addressed;
• ensured that consistent information reached both individuals in the couple, rather than relying on the partner communicating it after the event to the claimant (which frequently did not happen);
• allowed the adviser to act as an ‘advocate’ for the views and needs of each individual (especially those lacking in confidence) and even ‘negotiate’ on their behalf with the other party.

Above all, joint WFIPs were able to engage with the complexities of the ‘couple dynamic’ within households:

‘because of the problems these people have, it’s very difficult to focus on the partner alone because the two are so intertwined’

(Adviser)
On the negative side, joint WFIPs were said by advisers to:

- cause additional difficulties for the adviser by presenting two negative responses to deal with rather than one;
- more easily run out of control:
  
  ‘he’s either talking for her, or she’s talking for him… just chucking a spanner in the works every time…’
  
  (Adviser);
- run the danger of being dominated by the claimant’s benefits agenda, because it was easy for the adviser to end up talking mostly to the claimant as they were likely to be more familiar with the Jobcentre Plus office and with seeing advisers.

In addition, the role of the main claimant in WFIP/NDP varied. Where positive and supportive, advisers had found it relatively easy, and generally very productive, to make contact with main claimants and to enlist their help in moving partners forward. Where negative and obstructive, main claimant influences were seen to undermine any work that advisers tried to do with the partner. Even where partners were themselves receptive to the idea of working, they could not sustain the momentum imparted by a WFIP in the face of active resistance or passive non-cooperation from the main claimant. Advisers described instances of partners being prevented from attending training courses or discouraged from taking up job offers.

More generally, many advisers admitted to feeling more comfortable treating partners as individuals, as they were familiar with dealing with other types of customers in this way. Many acknowledged that joint interviews required different skills and handling from conventional one-to-one interviews. A number of advisers expressed a wish for specific training on how to conduct joint interviews. Advisers expressing a preference for single interviews also predominated in the two districts where greatest pressure was being felt on advisers’ time, and the reason given for the preference was frequently that single interviews were ‘quicker’ and ‘easier’ to conduct.

Even in jointly attended WFIP interviews, it was clear that partners were sometimes being addressed individually with the main claimants essentially ‘sitting in’ and for the most part not actively participating. This was confirmed by the quantitative survey, where the main criticism of joint WFIPs was that the adviser did not address any questions to the main claimant. Conversely, there was a feeling among some partners that the adviser spent more time talking to the main claimant than the partner, and this was more common where English was not the partner’s first language.

In general, advisers said that the value of joint WFIPs rather than single interviews depended on the ‘type’ of couple in question. It was widely acknowledged that no one model would suit all couples. Partners’ circumstances were generally seen as being too varied for it to be possible to say whether, overall, joint WFIPs were preferable to singly attended WFIPs or whether one model was more effective than the other.
The one area where there appeared to be a broad consensus among advisers was in relation to partners caring for the main claimant. In such cases advisers felt it was most often preferable to see the partner on their own for their WFIP, as many carers found it difficult to talk about their feelings, frustrations and aspirations in front of the person for whom they cared, as they frequently experienced guilt where there were conflicts of interest.

Overall, despite some of the concerns expressed by advisers, these findings suggest that joint interviews should be encouraged, both because the main claimant can usefully assist the partner during the interview and also because the WFIP may indirectly help job seeking main claimants find work (thereby reducing the number of workless households).

An alternative model for conducting WFIPs, which appeared to have the support of many advisers, was for an initial single interview followed by a longer joint interview, which would include a BOC. To some extent, this model had been introduced by default through the reduction in time slots for initial WFIPs. This procedural change has largely precluded carrying out BOCs at the first meeting and restricted the time that can be spent with each individual if they attend together. Joint interviews were generally agreed to take longer to conduct than single ones.

### 3.8 Timing of WFIPs

In the quantitative survey, the majority of partner attendees (68 per cent) felt that it was not the right time to talk about work or training when they attended their WFIP, with just a quarter saying that it was the right time (28 per cent). Younger attendees, men and those with children (all groups more likely to be looking for work) were all more likely to say that the time had been right to talk about work or training.

There were few obvious triggers for arriving at a situation receptive to WFIP. However, improvements in the health of claimants and partners, financial pressure from living long-term on benefits, the changing situation regarding children as they grew older, together with the effects of boredom and the need to ‘get out of the house’, all played some part in creating favourable moments for considering work. Fortuitous timing was particularly evident with regard to partners interested in self-employment.

The most commonly mentioned reasons why attendees said that it was not helpful to meet with an adviser at that time reflect the three main barriers to work amongst this group: health or disability, caring responsibilities and childcare. In addition, the qualitative research indicated that among partners of stock claimants, for whom the WFIP comes at an essentially random point in time in relation to the claim, the understandable reaction to the invitation was ‘why now?’ After several years of being a dependent claimant it was not evident to them why they now had to attend an interview about work.
Around two fifths (38 per cent) said it would be more than a year before a WFIP would be appropriate, while just over a quarter (26 per cent) said it would never be a good time. Only six per cent said within the next year. This confirms that many of the barriers preventing partners from working are long-term issues.

Analysis of later questions shows that those who thought the timing of the WFIP was not appropriate were also unlikely to think it had helped them. However, a quarter (22 per cent) of those who said the WFIP did not come at the right time felt that it had increased their confidence. This suggests that the WFIP can be beneficial even for those who do not expect it to be appropriate to them, even if it does not move them closer to work in the short-term.

3.9 Content and effectiveness of WFIPs

3.9.1 Work focus

More than nine in ten (93 per cent) partners who attended a WFIP had a ‘work focused’ element in their meeting. The extent to which the WFIP covered different items is summarised in Table 3.1.

Table 3.1 Items discussed at WFIP

<table>
<thead>
<tr>
<th>Item</th>
<th>Per cent</th>
<th>Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>Things that make it difficult to work</td>
<td>71</td>
<td>All</td>
</tr>
<tr>
<td>When might find work/how likely to find work</td>
<td>50</td>
<td>All</td>
</tr>
<tr>
<td>Work experience or skills</td>
<td>42</td>
<td>All</td>
</tr>
<tr>
<td>Training</td>
<td>51</td>
<td>All</td>
</tr>
<tr>
<td>Own (main claimant’s) claim</td>
<td>28</td>
<td>All</td>
</tr>
<tr>
<td>Other benefits they may be entitled to</td>
<td>18</td>
<td>All</td>
</tr>
<tr>
<td>Work-related benefits</td>
<td>28</td>
<td>All</td>
</tr>
<tr>
<td>Childcare arrangements or support</td>
<td>24</td>
<td>All</td>
</tr>
<tr>
<td>Special help or services related to caring</td>
<td>24</td>
<td>All, Those with children (2212)</td>
</tr>
<tr>
<td>Special help or services related to illness/disability</td>
<td>17</td>
<td>All, Those with illness/disability affecting type/amount of work (1202)</td>
</tr>
<tr>
<td>Help or training relating to literacy or numeracy</td>
<td>19</td>
<td>All, Those with literacy or numeracy difficulties (748)</td>
</tr>
<tr>
<td>Jobcentre Plus services</td>
<td>23</td>
<td>All</td>
</tr>
<tr>
<td>In-work benefit calculation carried out</td>
<td>11</td>
<td>All</td>
</tr>
</tbody>
</table>

*Base: Partner attendees (differs by item).*
3.9.2 Better Off Calculation

Advisers generally felt that the most valuable tool they had at their disposal to engage partners and even persuade them of the benefits of returning to work was information on Tax Credits, and its incorporation into BOCs, previously referred to as In Work Benefit Calculations (IWBCs). Some went so far as to describe the BOC as the ‘key’ to challenging some of the attitudes presented by partners in WFIPs. Advisers felt BOCs could be particularly effective for long-term stock claims where people had settled into a way of living on benefits and advisers felt that a BOC could help to challenge and overturn this ‘culture’.

Some advisers said that they tried to do a BOC with all partners at an initial WFIP, though most said that they could not find the time to do one. The available interview slot of half an hour allowed no more than the ‘basics’ to be covered. Therefore, the usual practice was to get partners to come back if they showed interest or needed a BOC, and to book an hour for the follow up interview.

Other reasons were given for conducting BOCs at a second meeting as well as the time needed to carry them out. In a majority of cases, advisers found that partners did not have the necessary information to hand at the first interview. Also, in many instances advisers would seek to get both partner and claimant to attend a second interview together. This maximised the benefits of being able to demonstrate the potential impact of working for the whole household, and allay claimants’ fears about the effects it might have on their benefits.

**Whether showed better/worse off**

Respondents in the quantitative survey that had a BOC were asked whether it said they would be better off or worse off entering employment. As shown in Table 3.2, there was a mixture of responses.

<table>
<thead>
<tr>
<th>Categories</th>
<th>Per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better off</td>
<td>39</td>
</tr>
<tr>
<td>Worse off</td>
<td>28</td>
</tr>
<tr>
<td>Would make no difference (spontaneous answer)</td>
<td>22</td>
</tr>
<tr>
<td>Don’t know</td>
<td>12</td>
</tr>
</tbody>
</table>

**Base:** Partner attendees who had BOC (345).

Partners of JSA customers were more likely to have been told they would be financially better off in work than partners of IS claimants (51 per cent versus 32 per cent), and related to this, those with children (particularly younger children) were more likely to have been told they would be better off. Supporting this, advisers interviewed in the qualitative research stated that BOCs for those with children almost invariably showed they would be better off in work than on benefits, because of the potential gains from Tax Credits.
As found in the qualitative research, even for those with children, the financial advantages of work were often quite marginal. Against these relatively modest gains, partners were balancing the expected disruption to their current ‘status quo’ and the anticipated difficulties they might have with childcare. In this context the number of dependent children became an important factor for several reasons:

- with more than two children, arrangements for childcare were seen as objectively more complex and opportunities for enlisting family help with it more restricted;
- the costs of childcare increased with each additional child, creating further pressure either for partners to hold out for better paid work, or for both the partner and the main claimant to have to seek work together;
- the ‘better off’ margin over benefits was also perceived as showing diminishing returns with each additional dependent child.

In the instances where the household was shown to be no better off or only marginally better off (or indeed worse off), advisers had no alternative but to advise such couples to remain on benefits, entrenching attitudes further.

Specifically, those with a caring commitment were more likely than average to be told they would be financially worse off (33 per cent reported this in the quantitative survey). This is confirmed by the qualitative research, where it was found that partners with caring responsibilities were felt to face particularly difficult barriers of cost and availability in relation to respite care, which would often lead to a negative BOC.

In addition, many of those with caring responsibilities were caring for claimants who were receiving a disability premium and carer’s benefits payments, thus reducing the likelihood that work for the partner would leave the household better off. Those restricted by other duties and responsibilities to seeking only part-time work, were similarly greatly reducing the likelihood of being better off financially in work.

Particular concern was expressed by advisers regarding young couples (under 25 years of age) whose BOC said they would be worse off in work. In one example, the BOC indicated that this would be the case unless the partner could find a job that paid well above the minimum wage (at least £7.60 an hour). As he had left school with no qualifications and had no previous work experience, the chances for him to secure such work were seen as fairly remote. In this respect, his experience of his WFIP was demoralizing and demotivating. The adviser in this case was reluctant to suggest working in a minimum wage job as a ‘stepping stone’ to experience and future better earnings potential, as she would otherwise do with a young person, because in the short-term the household would be worse off.

More generally, achieving positive results from BOCs for couples in receipt of higher rate benefits and premiums and for couples without children was often said to be difficult. Frequently it was the case that couples would only be better off if both of them worked or if the partner (or main claimant) worked full-time rather than part-time. As noted above, these scenarios were unusual in practice.
Administration of BOCs

The downside of the importance of BOCs was that there were a number of reported instances of partners being put off pursuing work options by what they saw as uncertainties in BOC results, inconclusiveness, or errors. A number of couples interviewed in the qualitative research reported that the results of their BOC had been misleading or simply wrong. After the partner (or claimant, or both) had moved into work they had found themselves worse off than before, despite the BOC having shown they would be better off.

A number of advisers admitted to having difficulties carrying out BOCs for partners due to gaps in their understanding of benefits eligibility rules. This was especially the case amongst advisers relatively new to partners work, and a lack of training was given by most of them as the reason for this. Most advisers were of the opinion that carrying out calculations for this customer group could be especially complex and time consuming. Not only was it generally difficult to get all the required information and financial detail from the partner alone, because much related to the benefit claim of the other person in the couple, but the context for understanding the results also depended on the circumstances, opinions and attitudes of both partners. It was felt to be particularly problematic trying to account for possible short and medium term changes in the claimants’ circumstances; for example accounting for movements in and out of training.

These complexities raised anxiety for some advisers, who were acutely aware of the critical importance of ensuring that BOCs were comprehensive and accurate. Given that many customers were making major decisions on the basis of BOCs, it was not surprising that the most negative reactions to NDP came from partners who either felt ‘misled’ by the outcome of their BOC, or perceived that it had not adequately covered all aspects of the changes involved in leaving benefits for work.

3.9.3 Interview length

In the first phase of qualitative research, there was some variation between districts in the amount of time allocated for WFIPs. However, this had all but disappeared a year later. The initial booking of one hour ‘slots’ had already been modified to 45 minutes or to 30 minutes in all but one of the five districts by the end of 2004. By the end of 2005 all districts were working to a uniform booking-in time of half an hour (in accordance with guidance), though many advisers said that in practice WFIPs were rarely lasting this long.

In the quantitative survey, the majority of attendees said that their WFIP lasted between ten and 30 minutes, and the majority of attendees (83 per cent) said that the interview length was about right.

Advisers felt that very short WFIPs were often inevitable, where partners were either fixedly uninterested in work or under such difficult circumstances as to make it unfeasible. In general, however, while advisers were generally of the opinion that the 30 minute interview slots were a reflection of the reality of most WFIPs, there were a number of consequences to having limited time:
• Some advisers felt that shorter WFIPs interrupted the flow of communication. This was seen as detrimental to the impact that WFIPs could achieve, even in cases where advisers managed to book partners in for a further meeting. In both the qualitative and quantitative interviews, some partners reported feeling rushed, and were unhappy that they had not been given more opportunity to ‘talk around’ things. In such cases, advisers appeared to have been totally focused on short-term job outcomes, and to have ended the interview at the first indication that a partner was not likely to produce such a result.

• In particular the short time slots tended to militate against BOCs at that stage of the process. While some advisers saw this as a disadvantage, others saw it as an opportunity in some cases to get the claimant to attend alongside the partner and to make further progress than was possible with an individual. More generally, some advisers adopted an approach that routinely kept initial meetings short and relied on a second meeting to go further with interested partners.

3.9.4 Outstanding issues

The majority of partners said that during their WFIP they had not wanted to discuss anything else which had not already been covered, although 11 per cent said there were additional issues that were not covered. They were most likely to mention:

• Additional help with training.
• Advice about what happens with current benefits if they move into work.
• General queries on benefits/pension/grants.

3.10 Customer views and attitudes

3.10.1 Response to invitation letter

In the qualitative research, many partners (and claimants) said they were untroubled by the appointment letter. Most expressed no more than curiosity about what exactly the WFIP would entail, and went along to the interview in that spirit.

Most adverse reactions to receiving appointment letters were from:

• stock partners who could not understand why the status quo of their benefits situation appeared to be being questioned. Many such customers found the wording of the letter ‘harsh’ or ‘severe’ in tone rather than helpful. To one partner ‘it seemed like a threat’;

• partners already working (usually less than 16 hours) failed to see the logic of them being called in for an interview when their unemployed partner (the main benefit claimant) was not;
partners who were carers expressed the strongest reaction. They felt insulted that the letter appeared not to give any recognition to these caring responsibilities, which meant that they were unable to consider work. In many cases, they thought that Jobcentre Plus must have details of their caring duties and could not understand why this was not reflected in the letter.

Eighteen months into the WFIP initiative, advisers reported noticeably less concern being expressed by customers about being called in for an interview. Some changes to the wording of letters had also taken place and advisers felt that these changes were positive. This highlights the importance of the initial invitation letter. In order to avoid alienating certain groups of partners, it is important that the appointment letter stresses that current circumstances and barriers to work will be taken into account during the discussion.

In this context, it is worth noting that partners’ previous negative experiences of Jobcentre Plus (possibly via the main claimant) may prejudice their attitude towards the WFIP and NDP programme. This would suggest that further emphasis needs to be placed on the fact that the programme is offering new opportunities specifically targeted at partners for the first time (as well as the main claimant) in both the appointment letter and by advisers during the WFIP.

### 3.10.2 Overall attitudes to WFIP

As shown in Table 3.3, the majority of partners and main claimants who attended a WFIP found them at least quite helpful.

#### Table 3.3 Helpfulness of advice received at WFIP

<table>
<thead>
<tr>
<th></th>
<th>Column percentages</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Partners</td>
</tr>
<tr>
<td>Very helpful</td>
<td>25</td>
</tr>
<tr>
<td>Quite helpful</td>
<td>41</td>
</tr>
<tr>
<td>Not very helpful</td>
<td>17</td>
</tr>
<tr>
<td>Not at all helpful</td>
<td>13</td>
</tr>
<tr>
<td>Don’t know</td>
<td>4</td>
</tr>
<tr>
<td><strong>Base: All attendees</strong></td>
<td>2,943</td>
</tr>
</tbody>
</table>

In the quantitative survey, the main reasons that partners (and main claimants who attended) found the WFIP helpful were:

- the adviser was informative, and gave them a better understanding of the available options. This was confirmed in the qualitative work, in which partners welcomed receiving information about what help and support was available for future use, clarification of options, and the stimulation of more strategic thinking. Practical help with training, and information on training and educational courses also figured prominently among those with a positive view of the WFIP process;
• the adviser was able to give them advice tailored to their circumstances. Again, this was echoed in the qualitative research, where partners who felt that the non-work aspects of their circumstances and their longer-term options had been taken seriously showed the most appreciation. Several partners who had had a joint WFIP accompanied by the main claimant were particularly impressed that the interview had taken a view of the family as a whole and had discussed the entire household situation.

The qualitative research also reported that most partners found their WFIP advisers to be personable, friendly and helpful, and were pleasantly surprised that they were not put under any pressure to do anything they did not wish to do.

Partner attendees from the quantitative survey who did not find the WFIP helpful most commonly said this was because:

• the WFIP was not relevant to their circumstances at that time. Respondents in the qualitative work also felt that the interview was inappropriate and a waste of time because of circumstances at home, which meant that work was not a feasible option. Childcare and other caring responsibilities figured highly among such reasons;

• the adviser was generally not helpful. The majority of partners attending a WFIP said that, overall, the advice they received had left them feeling like they had been treated as an individual (81 per cent). However, the qualitative research identified instances where this was not the case: some partners complained that the WFIP was too short and ‘scripted’ with no real empathy for their situation. Some felt it missed the target, prevented them from discussing what they wanted to discuss most and dashed high expectations of support and assistance. A sense of being ‘rushed through’ generated much of the adverse feeling. Many of these criticisms were closely tied into a personal dislike for an adviser’s particular approach;

• the adviser did not appear knowledgeable. Some qualitative respondents felt that their advisers were inexperienced and not very knowledgeable about WFIP and NDP. This may reflect the low priority accorded the client group and a need for improved specific training for advisers carrying out WFIPs – as recognised by advisers themselves.

3.11 Which partners benefit most/least from WFIP and why?

This chapter has already identified considerable variation in attitudes and experiences based on numerous different factors. In general terms, WFIPs were most useful to those who were looking for work at the time (e.g. this group was most likely to say the meeting was helpful in the quantitative survey).
Many advisers expressed the expectation that it would be the partners of JSA claimants they would find it easiest to work with, and from whom they would be most likely to get job outcomes. Advisers partly expected this to be the case because JSA claimants were unlikely to have a disability or serious illness preventing them from working and thus there was less likelihood of their partner having to act as their carer and being unable to work as a result. It was also partly because JSA claimants’ partners were expected to more easily fit the familiar model for Work Focused Interview (WFIs) of a single one-to-one interview with an individual. These perceptions are confirmed by the more positive views of partners of JSA claimants to the impact of the programme (see Section 5.6.6).

However, advisers in one district were of the opinion that WFIPs were working best for partners of IB claimants because they tended to have had no prior contact (or very little) with Jobcentre Plus, and were therefore often unaware of the help available. The WFIP was thus seen as a particularly important vehicle for conveying such information. In particular, the financial impact that being in work might have on benefits was seen as a key area in which couples had little recent knowledge and needed good, up-to-date information.

It is also clear that there was a substantial proportion of partners who did not perceive any major benefits from attending a WFIP. Specifically:

**Carers**

Advisers perceived a particular problem with dealing with partners who were carers, for the great majority of whom the programme was felt to be inappropriate. Frequently, the only realistic circumstance under which it was perceived that carers could work was if their caring responsibilities were to end – for example if the cared for spouse was to die. Tackling questions of this nature was not felt to be possible or appropriate. Carers themselves confirmed that WFIPs were often not appropriate: in the quantitative survey, they were most likely to say that the timing of the WFIP was inappropriate to their circumstances.

Some carers said they wanted to work (even if only part-time) but that they felt trapped by the circumstances of caring that they found themselves in. In spite of this there appeared to be little or no discussion or exploration of the details of caring responsibilities at WFIPs. Advisers felt they had little to suggest under such circumstances and no awareness of specialist agencies that they could refer carers on to. Indeed, the mention of caring responsibilities appeared to be being treated by some advisers as something of a ‘let-out clause’. Some customers described their adviser’s response to hearing that they were carers as being to bring the WFIP interview to a swift close. Several expressed frustration at not being given the opportunity to discuss fully their situation. Others said that they had found the implied confirmation that there was nothing they could do profoundly demotivating.
In addition, a third of those with a caring commitment who received a BOC at the WFIP were told they would be worse off, so where work was discussed the WFIP often did not obtain the desired outcome.

A few advisers saw room for a more intense WFIP regime to be applied to non-carer partners. There was widespread agreement that where partners were spouse carers it was preferable to conduct WFIPs individually rather than jointly with the main claimant.

**Disability**
Discussion of specific work issues was lower among those with a long-term illness or disability, reflecting the fact that this may have been inappropriate. Where the illness/disability affected the type or amount of work they could do, partners were more likely than average to say they had wanted to discuss topics not covered in the WFIP (15 per cent), suggesting that the WFIP was not able to explore their personal circumstances adequately. However, disabled partners were particularly likely to value the option of a joint WFIP.

**Those whose first language was not English**
This group was less likely than average to find the WFIP helpful (61 per cent). The length of the WFIP was often shorter for these respondents (only 13 per cent lasted over 30 minutes). Although similar to average on the overall ‘work focus’ measure, partners whose first language was not English tended to only touch on one or two of the ‘work focus’ topics.

**Age and children**
There were fewer differences according to age and children. However, the following variations were observed:

- Those aged 50+ were no less positive to the WFIP than other partners. However, they were less likely than average to have a work focus, and to have discussed training at the WFIP.

- Younger partners were less likely to have felt that the adviser addressed them as an individual. This is linked to interview length: some younger partners had short WFIPs and in general, partners who had a short WFIP were less likely to say they had been treated as an individual.

- Although similar to average in their perceptions of the WFIP, those with children (particularly younger children) were more likely to have been told they would be better off in a BOC, suggesting that this can be a particularly effective tool for this group.
4  New Deal for Partners

Summary

- Impact analysis indicated that Work Focused Interviews for Partners (WFIP) participation had increased New Deal for Partners (NDP) participation, although the numbers going on to NDP were still very small (around one per cent of eligible partners).

- NDP was most relevant to those looking for work; in these cases NDP could help with job search or training. Other participants attended further meetings specifically to receive a Better Off Calculation (BOC). Inactive case loading was particularly important for those further from the labour market.

- The length of involvement in NDP varied. Some partners only had one follow-up meeting (mostly for a BOC), and case loading could involve minimal levels of contact. Those involved in training and particularly receiving help with self-employment tended to have more intensive and longer-term contact.

- Perceptions of NDP were strongly influenced by the outcome obtained. Some partners left NDP quickly, either because of a negative BOC or inability to overcome barriers to work.

- Positive views were more common among those receiving help towards self-employment and those receiving training. Training was particularly appreciated where short courses with flexible hours were available, although such courses could be in short supply.

- Partners with multiple barriers were less positive, especially when these were associated with the family as a whole.

The NDP programme was enhanced nationwide at the same time as WFIPs were introduced in April 2004, and WFIPs were designed as a new route onto the NDP programme to boost participation.
4.1 Discussion of NDP at WFIP

A key purpose of WFIPs is to provide partners with information on the support that can be given via NDP. In the quantitative survey, 25 per cent of partners attending a WFIP said that the adviser suggested having further meetings. In addition, 19 per cent said that although the adviser had not actively suggested another meeting, s/he had left their contact details with the respondent and asked the partner to make contact when it was appropriate.

The importance of ‘selling’ NDP to partners at their WFIPs was emphasised by several advisers, reflecting concerns that they only had one chance to influence decision making and persuade partners of the benefits of working. In addition, increasingly ‘remote’ administration processes were said to ‘set the wrong tone’ for WFIP interviews by obliging advisers to spend much of the reduced time available reassuring customers and emphasising the voluntary nature of NDP. This meant that not only was less time available for persuasion, ‘selling’ and getting information across, but that the context of the interview was often working in the opposite direction to that required for a productive work focus.

**Should further meetings have been discussed with more partners?**

Most advisers said that they routinely closed WFIP interviews by inviting partners to re-contact them in the future if their circumstances changed and they were seeking work. A total of seven per cent of partner attendees in the quantitative survey said they did not discuss further meetings but would like to have done so. Those most likely to say this were partners who were looking for work; Jobseeker’s Allowance (JSA) and Income Support (IS) partners, rather than Incapacity Benefit (IB) partners; men; younger partners.

**When further meetings were discussed, was enough done to secure partners’ engagement?**

Where a further interview had been booked at the WFIP, 82 per cent of respondents said that they attended this meeting. However, in other instances (i.e. where a meeting was discussed but not booked), partners were unlikely to have had a further meeting by the time of the survey (five per cent had done so).

Advisers were often thinking of the long-term when they suggested having further meetings, in which case a firm booking may not have been appropriate. Nevertheless, these findings suggest that further meetings tend to have taken place only when they were booked at the WFIP.

More generally, advisers did not feel that they had the time to secure follow-up contact, with their current workloads and other priorities. There was a feeling among advisers that it would involve considerable extra effort to move a greater proportion of partners onto NDP. This meant that the longer-term needs and aspirations of some partners could be missed or overlooked by advisers at WFIPs.
4.2 NDP participation

Descriptive analysis of the participants’ database showed that overall 1.2 per cent of all eligible partners in Jobcentre Plus areas were recorded as entering NDP. Among eligible partners, those who had attended a WFIP were more likely to have started NDP than those who had not: 3.5 per cent compared with 0.5 per cent.

**Impact analysis of the administrative data indicates that WFIP participation increased NDP participation by about 3.5 percentage points**

Of those NDP participants identified as eligible for WFIP in the Working Age Statistical Database (WASD) data, 15 per cent self-referred. Whilst this proportion for NDP participants who self-referred may seem high, the qualitative research suggests genuine self-referral, where partners simply hear about NDP and self-refer by walking into a Jobcentre Plus office ‘off the street’, was extremely rare. Advisers noted that a considerable number of partners who had participated in NDP did not move directly onto the programme from a WFIP, but took information and ideas away with them to discuss with their (claimant) partners prior to committing themselves to joining NDP. While for some this process was relatively short and they re-contacted the adviser within a few weeks to arrange a further meeting, for others (who could not start work immediately) it was a much longer gap. These were customers who would re-enter the Labour Market System (LMS) system as ‘self-referrals’ after such a gap, despite the fact that the process had clearly been started or contributed to by their WFIP.

By Phase two of the qualitative work, it was evident that there were still only very small numbers of partners entering the NDP programme. Current caseloads of one or two partners were typical and many of the advisers had no case loaded partners at all. Therefore, nearly two years into the initiative there was little indication of any significant build up of expertise in understanding and supporting partners.

The qualitative research indicated that the proportion of partners moving onto NDP directly from a WFIP may have declined over time. The two main factors contributing to this were the winding down of stock processing and the phenomenon of ‘returners’ whereby partners who had previously attended a WFIP and then left the process, were returning to advisers several weeks or months later and being recorded as self-referrals even if their WFIP had been instrumental in their seeking work and NDP support.

**4.2.1 Which partners join NDP?**

In the administrative data analysis, for the stock it was possible to look at variations across subgroups in the effect on NDP take-up. As with the consideration of benefit outcomes, those on benefit for less than two years, those claiming JSA and those aged 25-45 were more likely than their counterparts to respond to WFIP participation by participating in NDP.
Advisers perceived the partners of JSA claimants to be more likely than the partners of other claimants to participate in NDP. According to advisers, this was because:

- they had a more ‘receptive’ mentality for advice, by virtue of familiarity with JSA conditionality;
- they were often more amenable than other partners to an approach that focused on the individual customer. They did not demand or require lengthy engagement with issues concerning the couple or the household. Most partners of JSA recipients were seen to face fewer employment barriers than other partners. Those barriers they did face were generally familiar ones: childcare issues for younger couples; issues associated with longer-term unemployment for older couples;
- several advisers admitted to being more confident about dealing with JSA partners, compared to IB and IS partners, because they were most similar to the customers they had been used to seeing previously.

Participation in NDP can also be considered in terms of distance from the labour market, and this was examined in the qualitative research. Partners already actively looking for training or employment, or at least actively considering their options, found WFIP/NDP fitted in well with their thinking and actions, and they also moved directly from WFIPs onto NDP. Getting help with arranging suitable training, job search or job applications were the main things such partners initially sought from participating in NDP (sometimes the only things).

For a small number of partners, the call to a WFIP and the offer of support into work on NDP came at just the right time for them. Those already thinking about employment for themselves described in very positive terms the effect of relevant, up-to-date information and support, and the opportunity to talk through employment issues with an adviser. In several cases it provided the crucial ‘nudge’ to move them from general, rather vague, consideration of employment possibilities to a clear focus on work and the action required to make it happen.

It was clear that other partners were participating in NDP despite not actively looking for work. This included a relatively large number who, unsure of the viability of them working, wanted to know whether they would be better off in work than on benefits, and if so by how much. Because there was often not time to complete a BOC at the initial WFIP, a follow-up meeting was usually booked as an initial NDP meeting. In general, there was some uncertainty among advisers as to how and when they were supposed to be marking entry to NDP on the LMS, which indicated variability in practice across districts. Some areas regarded the first voluntary meeting following a WFIP as entry to NDP, whereas others said they did not always do so.

Where partners took part in an initial NDP meeting but were not actively looking for work, the ability of advisers to keep in touch was particularly important. In some districts, advisers were ensuring that they had an effective process for ‘inactive case
loading’ by keeping details about partners who said they might want support at a later date, and contacting them by telephone after three or six months or at a time when they had said they expected to be ready to take action. This inactive case loading involved partners who had participated in an initial NDP meeting and some who had only attended a WFIP. The existing LMS system was said not to easily support such a practice. As a consequence, advisers were keeping paper records of circumstances and contact reminder dates in parallel with computerised systems.

**Considerable autonomy appeared to be given to advisers by their managers in how they kept in touch with partners** and followed up those who might, at a later date, participate in NDP and enter work. As one Business Manager expressed it, good follow up ‘depends on effective case load management’. The need expressed by some advisers to ensure a formal follow up procedure was felt all the more acutely because of the current lack of any programmed review meetings for the partner customer group.

### 4.3 Customer awareness of NDP

Among partners who had attended further meetings after the WFIP, 36 per cent had not heard of NDP (and only a quarter thought that these further meetings were part of NDP). While this indicates low levels of awareness of NDP, it may at least partly reflect knowledge of the term ‘New Deal for Partners’ as much as the nature of help available. This is confirmed by the qualitative research, in which partners were sometimes unsure of whether they were part of NDP or not, and viewed further participation in terms of the specific help they were getting rather than the programme under which it was being delivered.

A number of advisers also reported confusion among customers about the nature and conditionality of NDP. Some partners were said to be under the impression that if they joined the New Deal programme and then did not get a job, the main claimant’s benefits would be sanctioned.

### 4.4 Caseloading and further meetings

The qualitative research with advisers revealed that many partners who were flagged on the LMS as having entered NDP had only seen an adviser on one occasion following the WFIP, and had not been case loaded. Typically, this additional meeting was to allow a BOC to be carried out. When the BOC showed that the partner would not be financially better off, or would not be sufficiently better off to persuade them to seek employment, they left the programme.

The length of involvement varied, as did the intensity of support. Those following the self-employment route on NDP had typically had meetings with an adviser prior to each stage of the training and support programme and were expecting to have at least one further meeting at the end of their 26 weeks of test trading.
Otherwise, case loading could often involve minimal levels of customer contact. A frequent pattern was for customers to accept help with jobsearch and for advisers to agree to let them know of any suitable job vacancies that might arise. Often this would not entail any face-to-face contact after an initial meeting.

The intensity of contact with partners on NDP was also dependent upon the ‘style’ and preferences of advisers. Some clearly preferred to deal face-to-face with customers whenever possible, others made greater use of the telephone and of contact by letter. Much job search support was conducted by telephone, with suitable vacancies discussed, posted out to customers and later chased up again by telephone.

By Phase two of the qualitative research, apart from with partners working towards self-employment there was little evidence of long-term, active support being provided to customers on NDP. With many customers described as ‘harder to help’ the approach of advisers was to hold off to allow time for issues that they felt they could not themselves tackle to resolve themselves first, before intervening again.

4.5 NDP delivery

By the time of the second phase of qualitative fieldwork, earlier observed moves in some offices to concentrate partners work with a single adviser had been abandoned in favour of the greater flexibility that could be derived from distributing the work among a number of advisers.

The few partners interviewed who had seen a different adviser for their NDP meetings from the adviser who had conducted their WFIP were mostly of the opinion that, to avoid repetition and the need to re-establish trust and a good relationship, they would have preferred to continue seeing the same person, even after fairly lengthy gaps in time, had this been possible.

4.6 Staff views of NDP

Enhanced NDP was introduced to offer the same type of support to partners as was available to other Jobcentre Plus customers, particularly lone parents. In spite of this, however, several advisers felt the programme still to be lacking in what they referred to as ‘effective incentives’ for those partners considering work and training options. This in part appeared to be the result of a perception that partners were a ‘hard to help’ customer group. It was reinforced by advisers’ experience of how difficult it was to persuade partners at their WFIPs to participate in NDP. The ‘hurdles’ to be overcome by partners, in making such a transition from mandatory interview to voluntary participation in New Deal, were perceived to be greater in number and considerably ‘higher’ than for many other customers – including lone parents.
As a result, there was a widespread view among advisers that NDP was a small and ‘unproductive’ programme, accorded relatively low priority by them and their managers. The small numbers of positive outcomes (job entries) being achieved were likewise reinforcing negative perceptions of the amount of time and effort required to deal with this customer group. By the time advisers were re-interviewed, the lack of enthusiasm for dealing with partners was evident in most districts and there was little or no ‘ownership’ of the customer group.

4.7 Partners expectations/needs of NDP

Partners who entered NDP gave a variety of reasons for having chosen this course of action; these are outlined below.

4.7.1 Better Off Calculations

As noted earlier, BOCs tended to take place at a subsequent meeting, rather than at the WFIP. Partners saw this as one of the most important aspects of their overall contact with advisers; BOCs and Tax Credits were by far the most frequently mentioned elements of NDP that customers found helpful. Generally, they understood that this was an opportunity to get an authoritative and informed view of the viability of working in their circumstances. Partners on NDP particularly valued BOCs because so many of them had chosen to seek only part-time work due to constraints on their time from caring and childcare responsibilities. However, partners’ overall views of NDP were strongly conditioned by the outcome of their BOC as this was the key gateway to achieving their desired outcome.

There was an element of thwarted aspiration in the views of NDP held by partners whose BOC told them they would be worse off financially if they started work. One had given up pursuing employment when her BOC showed that she would be no better off in work. Another had reluctantly started working less than 16 hours a week because the BOC had demonstrated that full-time work was not a viable option.

Many partners joining NDP specifically to have a BOC had entered work – some by finding their own jobs and others with the help of an adviser. In the former scenario, partners had often found themselves a job independently and only at that point accessed NDP services and support to confirm that they would be better off and to benefit from any additional help on offer, including Adviser Discretion Fund (ADF) payments and assistance with administrative paperwork related to Tax Credits.

4.7.2 Job vacancies

There was a group of partners who entered NDP solely to gain information on job vacancies and to get adviser assistance with job-search activities such as CV preparation and applications to vacancies. These customers were typically unqualified and saw their main barrier to working as being the length of time they had been out of work.
4.7.3 Training

A number of partners joined NDP to find out about and access training opportunities. Several partners giving this reason for entry had no qualifications and were looking to develop themselves. Others held relatively low-level educational or vocational qualifications and were looking to learn new skills or to update skills after a period out of the labour market.

Partners often saw training as a way of testing their ability to spend time away from the home, and away from caring and childcare responsibilities. Several were specifically seeking part-time training options that they could fit around other commitments.

Good experiences on training courses led to very positive views of NDP even when they had not yet resulted in employment. Partners were particularly appreciative of short courses with very flexible attendance hours. Such provision, however, was not always available and advisers in some districts confirmed a shortage of this type of provision that they could access for partners.

4.7.4 Self-employment

A separate and relatively large group of partners had joined NDP specifically to get support and training for self-employment. As a group they tended not to have been out of the labour market more than a few years, to be relatively well educated and to hold higher-level qualifications, including degrees. Several had been earning good salaries prior to the circumstances that had led to the household being on benefits (for example, illness, redundancy). In these respects they could be said to be somewhat untypical of the partner customer group as a whole.

Most partners pursuing the self-employment route came onto NDP following a WFIP. Several indicated that this meeting with an adviser was the first time they became aware that Jobcentre Plus could provide support and training related to self-employment. Most partners had been thinking seriously about self-employment as an option prior to being called to a WFIP, but the WFIP had allowed these thoughts to become concrete possibilities and led to action.

Self-employment was often seen as a workable solution to a complex set of circumstances and barriers. A number of partners seeking self-employment were seriously constrained by caring responsibilities, and saw the demands of caring for their (claimant) partner as the main barrier to employment that they faced. Working from home was also seen as potentially fitting well with childcare demands. One note of caution however is that income may not always be high or reliable: Department for Work and Pensions (DWP) analysis shows that 15 per cent of working-age households with below average income are couples in self-employed work.

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6 In comparison with the partner group as a whole, where more than half had last worked five or more years ago or not at all (see Table 2.2).

Partners who had decided to enter self-employment were among those with the most positive views of NDP. In all areas there were well-established providers offering a ‘package’ of self-employment training and support including ideas development, accounting and business planning, and test trading. All those working towards self-employment were enthusiastic about the training and support, and rated access to it as the most important and helpful aspect of NDP for them. In phase two of the qualitative research, self-employment continued to be a successful route into work from NDP, although more recent cut-backs in training provision and funding for test trading were reported to have put it under threat.

4.7.5 Confidence building

Seeking personal support and building up self-confidence was given as the key reason for joining NDP by a significant group of partner participants. As might perhaps be expected, these were predominantly WFIP-route entrants and were almost all women. They also tended to be younger on average than other participants (in their late 20s and early 30s).

Advisers had frequently managed to find training opportunities (especially short term courses) linked to work placements for these partners and NDP appeared to be working successfully to overcome their fears and concerns and bring them closer to the labour market.

4.8 Addressing partners’ issues

4.8.1 Further meetings

In the quantitative survey, attitudes to further meetings were very similar to those concerning the initial WFIP: 77 per cent said the NDP meeting was very or quite helpful, and 20 per cent not very or not at all helpful.

Qualitative interviews found that positive views were strongly correlated with successful job outcomes, especially among those WFIP route entrants who had successfully moved into employment and among partners who had been supported into self-employment. Self-referred partners tended to be rather more critical of NDP overall than were those who had entered via a WFIP, perhaps reflecting their higher expectations of the programme.

Positive appreciation was expressed specifically for:

- advice, information and additional funding provided;
- self-employment training and supported test trading;
- help with motivation and building self-confidence;
- the opening out of viable work options;
- the effect of work (and training) on personal and wider household wellbeing.
Some NDP participants were of the opinion that the programme had not been of any help to them at all. Perhaps not surprisingly, they included many partners who had since returned to the same position they had been in prior to taking part, namely as non-working dependants on a benefit claim. Many of this group of partners had also had negative experiences with providers that had shaped their view of the programme.

Other negative views focused around:

- inconsistent or inaccurate (or unwelcome) information – especially from the results of BOCs;
- perceived lack of adviser expertise;
- offers of what partners perceived to be the wrong ‘types’ of jobs (in terms of skill levels, pay and hours);
- lack of response or follow-up from an adviser.

Main claimants’ views of NDP broadly mirrored those of partners both in terms of positive aspects and negative ones. Frequently those who had seen the process help their partners expressed a desire for the same type of support for themselves. They tended to echo partners’ positive perceptions of the wellbeing (both financial and non-financial) of the household following successful NDP participation and entry into work for the partner. Many noted in particular gains in confidence and motivation for all members of the household especially in situations where all the potential gains had been realised from their partner successfully maintaining self-employment (of which there were several examples).

There were several instances where the opportunity to look at the whole household situation had meant that main claimants had responded to results of BOCs that showed work non-viable for the partner by starting to seek work for themselves. For some this had led to successful entry to employment for the main claimant.

However, more often NDP was seen to operate essentially at the level of the individual. NDP appeared to be best at addressing self-confidence issues, and at dealing with other individual needs such as the need to redress a lack of relevant work skills or a lack of qualifications. Despite being presented as a programme aimed at and focused on the household rather than the individual, it would appear that, in practice, NDP operates least well in these areas, and operates most effectively at an individual level and on issues that can be addressed one-to-one with an adviser. The admitted reluctance of many advisers to delve very deeply into couple and household issues could thus be seen to be as much an implicit recognition of the weaknesses of the programme as it is a reflection of advisers’ personal preferences and professional experience. The management and organisational context of Jobcentre Plus (including crucially a strong target-driven culture) was reinforcing this orientation, and arguably contributing to the low priority and low expectations accorded the programme.
Also, there were indications that partners were not always getting the help they wanted from NDP. When asked if there was anything else they wanted to discuss that was not covered in the further meeting(s), 18 per cent said that there was. Respondents were most likely to mention more help with benefits, other financial advice about what happens if they moved into work, more help with training and more help with finding work or career guidance.

4.9 Likely outcomes from NDP

The main reasons for leaving NDP that were identified in the qualitative research are outlined below.

Advisers were successfully achieving job outcomes with some partners, but the circumstances under which they were able to do so were frequently atypical of the customer group as a whole. For example, there were instances where female partners of JSA customers were successfully moved into work because their male main claimant partners were willing to take over responsibility for looking after children. However, it appeared that in far more cases this was not an option people were willing to consider seriously.

As noted above, many partners attended an initial NDP meeting specifically to conduct a BOC. Some of these partners then abandoned the idea of work if their BOC was unfavourable.

A further group of partners were unable to cope with the demands of training that was available. Other partners were disappointed in what providers were able to offer them in terms of courses and placements. Others reluctantly arrived at the conclusion that the constraints on them working were too great to overcome and drifted away from NDP, exiting after a period of non-contact with the adviser.

As noted above, there was sometimes minimal contact between many partners and advisers for much of the time, with participants being sent vacancy information but advisers getting no feedback from them to judge whether they were being unsuccessful in job applications or were simply not acting upon the information being sent. Many partners were therefore reported to have ‘drifted off’ the programme in this way without informing their adviser, and little was known as to the reasons for their exits.

In addition, it appeared that much in the way of resistance by claimants toward their partner’s participation in NDP, was probably going unnoticed. Several advisers commented on the high rate of ‘no shows’ to NDP meetings and frequent unexplained disappearances of partners from off their caseloads. This phenomenon was contrasted with other customer groups, especially lone parents.
4.10 Are there groups for which NDP is most/least suitable and why?

In the qualitative interviews, partners were more likely to express positive views of NDP if they:

- were seeking to deal with issues of self-confidence;
- perceived their main barrier to be a lack of skills or qualifications or a criminal record;
- had their own limiting health issues to deal with;
- perceived themselves to have no significant barriers to working;
- had decided to enter self-employment.

Partners were more likely to express negative views of NDP if they:

- were without dependent children, or had pre-school or early school-aged children;
- had barriers relating to care responsibilities for the claimant;
- were looking for part-time rather than full-time work.

Dissatisfaction among partners with younger children on NDP reflected the added difficulties of reconciling the childcare needs of this age group both with work and often also with caring. It is important to recognize that many of these factors overlapped and inter-related in individual cases. As with the many caring partners who were dissatisfied with NDP, this suggests that the programme is managing to have only limited impact in cases where partners face multiple barriers, and especially when those complex, multiple problems originate from within the couple relationship and the household.

A few of the NDP participants interviewed were aged 50 or over and they appeared to be faring comparably to others on the programme. All were the partners of IB customers and all were WFIP route entrants. The main reasons they gave for participating in NDP and seeking work were health improvements in their previously cared for spouses, and the persuasive evidence from BOCs.

All but one of the NDP participants interviewed aged over 50 perceived their skills and workplace experience to be outdated and had therefore undertaken training while on NDP, and some had successfully entered employment. All of those who had started jobs since participating in NDP were still in work six to twelve months later. Although concerns were widely expressed about perceived age discrimination in the jobs market, their confidence that once in employment they could prove their worth and their reliability were perhaps being borne out in practice.
4.11 Good practice

Some areas covered by the qualitative research reported an increased level of outreach work and the availability of mentoring provision. In each of these, however, the reported provision and initiatives had been primarily directed at other customer groups (notably lone parents) and the impact on partners had been very slight. Advisers struggled to remember any partners who had been brought onto NDP via outreach work, although some contacts had been made in this way. Equally, although mentoring provision was open to partners, and was being made available regularly in Jobcentre Plus office premises, advisers reported barely any use of the service. One adviser felt that it was ‘not the kind of thing partners want’ and cited instances where she had referred partners to the provision but they had declined to take it up.

One other area in which it was felt that partners were able to gain some ‘spin-off’ benefits was from the experience and practices developed in IB Pathways pilots. The specific advanced adviser training for IB advisers and the additional resources for helping with training and rehabilitation, were said to have created expertise in pilot areas that was directly transferable to many in the partners customer group.

4.12 NDP and policy intent

Among those who had achieved job outcomes at the time of the research, there were a discernable number of key factors that appeared to be widely shared and making a significant contribution to this success. Foremost among these were:

- having the full and active support of the claimant in the couple/household;
- obtaining a favourable and timely result from a BOC; and
- being able to build on prior discussion and planning about employment options and implications.

Support from the claimant did not always manifest itself in terms of jointly attended meetings. Advisers frequently kept in contact with claimants by telephone, keeping them informed and party to discussions informally – for example by taking advantage of the claimant answering the telephone when a call was being made to the partner. The active involvement of claimants in discussions with their partners between meetings with an adviser were often more important and more productive than actual attendance jointly at meetings in the local Jobcentre Plus office.

4.12.1 Importance of effective initial WFIP

Evidently, boosting the numbers of NDP entries is not in itself a guarantee of additional job entries. A thorough and effective initial WFIP would appear to be the best guarantee of attaining a successful outcome from NDP. This was also felt by many advisers to be particularly important because:
• the ‘grey area’ between partners definitely wanting to work, and those definitely not wanting to work was seen to be ‘very narrow’, and

• with no follow-on review meetings for partners, the WFIP was the only opportunity to engage, inform and persuade them regarding the benefits of work. For this reason, there was a degree of support from several advisers for the idea of increasing the mandatory elements for partners – essentially for having a further mandatory interview at a point 6 or 12 months after the first WFIP.

4.12.2 The instability of partners’ circumstances

The qualitative research reported that a successful job outcome from NDP was often far from being the ‘end of the story’.

Some of the instability derived from partners’ involvement in situations of poor health. Almost by definition, claimants with serious health problems were not in a stable state. At any given time they were either improving or deteriorating. Sometimes these changes could be rapid and unpredictable. In several cases a ‘flare up’ in the claimant’s health condition had meant that their partner had been forced to give up a recently acquired job and return to being a dependent on their benefit claim.

The other major factor contributing to the instability partners experienced was the state of the labour market and the nature of the jobs to which they had access. Several partners had achieved successful job outcomes from NDP only to lose them shortly afterwards.

Many couples were acutely aware that jobs can be insecure. This was especially perceived to be the case with regard to those ‘entry level’ jobs into which most of them would move. There was considerable caution, therefore, about leaving the security of benefits. The ‘fear factor’ in contemplating work was felt to be particularly acute for partners, given the many complex aspects of their situation that could adversely affect them and lead to a return to unemployment.
5 Impact of WFIP and NDP

Summary

- Impact analysis of the effects of Work Focused Interviews for Partners (WFIP) and New Deal for Partners (NDP) eligibility shows a small reduction in benefit claims for stock couples. However, this is likely to be driven by a deterrent effect, with WFIP participation doing little to encourage benefit exits.

- For flow couples, no significant effects of WFIP eligibility or participation were evident, although there were indicative effects noted for NDP and NDP/WFIP combined.

- The quantitative survey confirmed that very few couples were moving off benefit, and that not all those leaving benefit had moved into work.

- There is no evidence of WFIPs increasing the number of partners looking for work.

- Although WFIPs and NDP had made some partners consider increasing their hours, there was no evidence of this happening in practice other than in isolated instances.

- The ability of WFIP and NDP to reduce child poverty is extremely limited, because of the limited movement into work, and the preponderance of low-paid, part-time work among those who do move into employment.

- Nevertheless, WFIPs were often seen as having a positive impact on partners’ confidence and in increasing their knowledge of support available.

This chapter examines the extent to which WFIP and NDP have achieved their policy objectives.

5.1 Reducing the number of workless households

5.1.1 Partners leaving benefit and entering work

This section presents the estimates of the effects of WFIP and NDP on benefit claims, separately as well as in combination. These were obtained using both difference in
differences (DiD) (including the random growth model) and instrumental variable (IV) approaches, based on administrative data.

As an overall comment, the results are less definite than would be desired, because of issues of data quality, although this affects estimates of the effect of NDP and WFIP/NDP combined more than the effects of WFIP alone.

The main findings for stock couples are:

- WFIP eligibility appears to reduce benefit claims after 37 weeks by about one percentage point. This estimated effect of eligibility on benefit status is small but statistically significant.

- Stock couples on Jobseeker’s Allowance (JSA) were more likely to exit benefit than those on other benefits. Those with less than two years benefit duration were more likely to exit than those who had been on benefit for longer. Those aged 25 – 45 were more likely to exit than those who were older or younger than this.

- The effect of NDP eligibility on stock partners 37 weeks after eligibility commenced was a decline of about one percentage point in benefit claims. This was only marginally statistically significant. This effect of WFIP/NDP combined was estimated to be similar, although these results appear a little more statistically significant.

Eligibility is distinct from participation. Specifically, not all of those who are eligible will participate in WFIP. The effect of eligibility therefore represents a combination of the effect of participation for those who participate and the deterrent effect for those who do not participate; specifically, this is the possibility that the requirement to attend a WFIP acts to encourage benefit exits.

On balance, it appears that the observed effects for the stock are driven by a deterrent effect and that WFIP participation does little to encourage benefit exit. This is because:

- the estimates presented above become significant about 17 weeks after the date of eligibility (and are close to significance for quite a number of weeks before that). This is slightly earlier than the average time taken to participate in WFIP, suggesting that individuals have chosen to end spells rather than participate in a WFIP;

- there were no significant effects evident for flow couples (as described below). This is surprising if one believes the eligibility effect operates largely through participation in WFIP since it seems plausible that flow clients are easier to help than stock clients. The fact that the effect is actually greater for the stock therefore adds to the evidence supporting the view that the deterrent effect is driving the observed WFIP effects.
There is therefore no evidence to suggest that WFIP encouraged the movement from non-employment to employment among stock couples.

The main findings for flow couples are:

- No significant effects of WFIP eligibility or participation were evident for flow couples. This was true when considering the population as a whole and when considering results separately according to whether claiming JSA or according to age.

- Significant effects of NDP and NDP/WFIP combined were evident for flow couples. In view of concerns over the data, these results are viewed as being indicative of NDP and NDP/WFIP causing a significant reduction in benefit claiming, but with the size of the estimated effect unreliable.

The quantitative survey also looked at movement off benefit, as shown in Table 5.1. This confirmed the overall picture that very few customers were moving off benefits following a WFIP. It also confirmed the likelihood of a deterrent effect, as non-attendees were more likely than attendees to have left benefit since the WFIP. Table 5.1 also shows that not all of those leaving benefit had moved into work.

Table 5.1 Benefit status at time of quantitative survey (four to six months after WFIP)

<table>
<thead>
<tr>
<th>Benefit Status</th>
<th>Column percentages</th>
</tr>
</thead>
<tbody>
<tr>
<td>On benefit</td>
<td>97</td>
</tr>
<tr>
<td>Not on benefit, main claimant and/or partner in work</td>
<td>2</td>
</tr>
<tr>
<td>Not on benefit, neither in work</td>
<td>1</td>
</tr>
<tr>
<td>Base: All respondents (3,785)</td>
<td>2,943</td>
</tr>
</tbody>
</table>

5.1.2 Role of WFIP in finding work

Despite the above analysis, the findings from both qualitative and quantitative research showed that WFIP and NDP were helping some partners and main claimants to move into work. In the quantitative survey, among partners who had attended a WFIP, and had started work subsequently:

- 14 per cent found the job through Jobcentre Plus, and this comprised four per cent who said this was through an adviser, seven per cent from a Job Point and the remainder in some other way;

- where respondents said they got the vacancy though an adviser, they were also likely to say that the WFIP had an impact on them applying for the job, and that it helped them to get the job (in each case, four per cent of partners who started a job after the WFIP);

- one in five said that they had seen or spoken to an adviser since they started the job.
The qualitative research also identified instances where main claimants had entered work since their partner’s WFIP, especially male claimants. There were specific examples of IB customers being stimulated into taking action, in response to Better Off Calculation (BOCs) that showed it was not worthwhile for their partner to work part-time.

In other cases, the influence of the WFIP was indirect because the WFIP was not attended jointly. Nevertheless, discussion within the couple after the WFIP was described as providing a spur to serious discussions about work options that led to the claimant returning to work.

However, these positive examples need to be seen in the wider context. Although a number of partners said that WFIP and/or NDP had helped them to get a job, this group is only a minority of an already very small group of partners (those looking for and able to find work). Therefore it is not surprising that the overall impact is so limited.

5.2 Encouraging partners in workless households to achieve a successful and sustainable entry into employment

Overall, both partners and main claimants were likely to enter low paid work. Main claimants in the quantitative survey were more likely than their partners to be self-employed and to work full-time. These findings reflect gender differences, with women more likely than men to be in part-time work: 54 per cent of female partners were working less than 16 hours per week, compared with 21 per cent of male partners.

The qualitative research found that self-employment appeared to be the best sustained work. Where self-employment plans had successfully produced a viable ‘package’ of sufficient flexibility to address the many and varied needs of households in full, work was stable and there was strong determination to sustain arrangements into the future and avoid returning to benefits.

Qualitative interviews suggested part-time work had been less well sustained than full-time work, although some partners who had left a part-time job had subsequently moved rapidly into other employment. Customers gave a variety of reasons why their employment had not been sustained. Reasons for leaving work included a mixture of labour market factors and personal factors – the former included jobs ending unexpectedly and employers making unrealistic demands for extended hours and overtime working; the latter included deteriorations in partners’ health and inabilities to cope with working alongside caring responsibilities.

It was noticeable that in many cases in which partners had successfully entered employment this had only been achieved by virtue of considerable and extraordinary efforts on their part to work around obstacles, to be highly flexible in what they were willing to consider, and to make sacrifices in other areas in order to achieve their
work goals. In a number of such cases a willingness to work for low pay rates was combined with elaborate arrangements to fit hours around other commitments by working nights or particular early/late shifts in order to be available if needed at other times.

5.3 Helping job progression

Partners who were in part-time work at the time of the WFIP were unlikely to increase their hours subsequently. In the quantitative survey, just 13 per cent of these partners said they had changed their hours, and in some cases the number of hours went down rather than up (six per cent said the hours went down and eight per cent said they increased). A slightly higher proportion (16 per cent) said that the WFIP had made them more likely to consider increasing their hours.

In the qualitative interviews, several female partners working part-time said that their hours were constrained by childcare. One had joined NDP to seek to extend the number of hours she was working; she felt the time was right to do this as her daughter was now of an age where she no longer needed to be at home for her so much of the time. Several months after her WFIP, however, she had still not found a job that would allow her to extend her hours as required.

5.4 Creating the conditions for partners to make or regain contact with the labour market

5.4.1 Jobsearching

Table 5.2 shows that there was very little change in the overall proportions in work and looking for work between the WFIP and the survey, and this applied to both attendees and non-attendees.

Table 5.2 Partners’ work status at time of quantitative survey (four to six months after WFIP)

<table>
<thead>
<tr>
<th></th>
<th>Column percentage points</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>WFIP attendees</td>
<td>Non-attendees</td>
</tr>
<tr>
<td>Working</td>
<td>+2</td>
<td>+3</td>
</tr>
<tr>
<td>Looking for work</td>
<td>-1</td>
<td>0</td>
</tr>
<tr>
<td>Not working or looking for work</td>
<td>0</td>
<td>-3</td>
</tr>
</tbody>
</table>

Base: All partners (3,785).

Note: Figures show change in percentage points between WFIP and survey interview; positive figures indicate an increase between these two points in time.

There was some evidence from the quantitative survey that a WFIP had helped partners in their job search activities. Among partners who had been for job interviews:
• 12 per cent said that an adviser helped them find a vacancy, and most said that the adviser helped them get the interview itself (11 per cent).

• A further 12 per cent were helped in other ways, mainly by using a job point.

Four per cent of partner attendees said they had done some voluntary work in the previous 12 months, although only a minority of these started it after the WFIP. Where partner attendees did start voluntary work after the WFIP, the majority (74 per cent) said the adviser suggested it.

5.4.2 Training

One in ten partners in the quantitative survey said that they had been on some kind of training since attending the WFIP. A further 15 per cent said they had also considered training. Participation in training was higher among:

• partners who had attended further meetings (24 per cent);
• those who were looking for work (15 per cent);
• those whose first language was not English (17 per cent).

The first two groups were also more likely than average to have considered training. In addition, younger partners and partners of flow claimants were more likely to say they had considered training, with partners of IB customers less likely to consider training.

Advisers saw persuading customers to undertake educational and vocational training courses of various types as constituting an important element in moving people closer to employment. Advisers’ experiences with partners with respect to training illustrated further the nature of the client group and, in particular, how far removed many of them were from engaging in the labour market. Advisers reported a high level of demand for courses among those partners who were beginning to consider the possibility of changing their situation. However, most of the training available through Jobcentre Plus providers was deemed to be unsuitable because most partners were such a distance from the labour market. Many such courses were said to involve full-time attendance or long hours and a requirement for customers to undertake job search.

Many advisers therefore saw a need for greater variety of local training provision and more flexibility in delivery of courses so that partners would be able to access them. In particular, advisers identified a demand for shorter, non-vocationally specific courses that could be undertaken within part-time hours and fitted around caring and childcare commitments. Such courses could form the first small step for partners away from the situation they were in, facilitating a mental ‘break’ with the past.

Generally, these courses were not part of Jobcentre Plus provision, being run in local colleges or community centres and often free to the partners of benefit recipients – information gratefully gleaned from WFIPs by many partners. Although advisers identified developmental courses of this kind as particularly suited to partners, and
as being in demand, they did not form part of support currently available under NDP. For this reason, they were experiencing difficulties in monitoring whether customers attended or successfully completed them. With no time available to make follow-up contact, and no mandatory review meetings with partners, advisers had no way of finding out if progress was being made. Any results achieved from such courses, although potentially a strong measure of movement towards the labour market, were generally lost from Jobcentre Plus monitoring. So, although advisers were convinced that such courses formed a necessary pre-condition for movement towards employment, and continued to assist partners to take them up, they were unable to monitor or support them effectively or to take any credit for outcomes.

5.4.3 Building confidence

Findings earlier in the chapter suggested that WFIPs made very little impact in terms of increasing the proportion in work or actively seeking work. However, this section indicates that there were a number of ways in which partners felt the WFIP helped and encouraged them in considering work.

Where WFIPs were seen to have played a role, this was primarily in increasing knowledge and awareness of the help and support available. In the qualitative interviews, many couples expressed frustration and a sense of being trapped in a hopeless situation in spite of strong desires to get out and work. Discussion at WFIPs about work options could therefore help to increase confidence about a possible future return to work, even though individuals generally still remained at some considerable distance from the labour market.

In general, partners were much less likely to perceive their WFIP as having had any impact where it had failed, for whatever reason, to fully address the situation of the main claimant or that of the household as a whole. However, partners occasionally described a situation where the WFIP had allowed them to stand back from the needs of the claimant for a while and focus on their own needs separately to gain a new perspective on the situation as a whole. In some cases, this was evidently liberating and a positive experience, though clearly only the first stage towards possible employment. More generally, WFIPs carried the potential to assist partners to think beyond their immediate situation and get them to focus on the small steps that might be taken with a view to future options for work.

The problem facing advisers was that these outcomes could appear very small for the effort required. Only some advisers were willing or able to make the effort and investment of time required. Furthermore, many advisers did not think it sensible or appropriate to get involved in relationship or domestic problems. As a result, some opportunities to engage with partners may have been missed. However, there were undoubtedly real concerns among advisers of reaching the limits of their perceived remit and legitimate competency in taking on issues such as these.
5.5 Reducing child poverty

As noted above, there is no evidence of WFIPs and/or NDP reducing the number of instances where both partners in a couple are out of work. In addition, the quantitative survey showed that it was rare for both the main claimant and partner to be in work, either because of illness or disability, or because responsibility for childcare often remained within the couple.

It is also clear that even where the main claimant or partner did start work, this was often low paid, part-time work. As a result, many couples found they were only marginally better off financially, or in some cases were worse off.

The current strategy will therefore be unable to make an impact on reducing child poverty without addressing these fundamental issues.

5.6 Policy impact on key sub-groups of partners

5.6.1 Partners with dependent children

Some positive findings were evident for those with children. In the quantitative survey, within the group of partners who were looking for work, those with dependent children were more likely to say the WFIP had improved their chances of getting a job.

Partners with a youngest child aged between nine and 12 were more likely than average to acknowledge a greater awareness of job opportunities and increased confidence.

However, difficulties in obtaining suitable work (in terms of hours and flexibility) and the reluctance of many parents to consider formal childcare represent major barriers to increasing the number of parents in work.

5.6.2 Health/disability

Partners with a long-term illness or disability said in the quantitative survey that they were less likely to be more hopeful about the future, as a result of advice they received in the WFIP.

Advisers saw these health problems as particularly important in making it difficult for WFIPs to have any impact with many partners, and several advisers expressed frustration at feeling restricted by a lack of specialist knowledge.

5.6.3 Caring responsibilities

As noted elsewhere in this report, partners with caring responsibilities posed a significant challenge to the WFIP/NDP process.
Certain caring responsibilities effectively presented partners with an insurmountable barrier to employment at a given point in time. However, it was clear from qualitative interviews that such situations were not necessarily fixed, but were subject to change over time. A seemingly hopeless situation, closed to any possible intervention could, in the space of even a few months, change and offer new opportunities, because of changes in circumstances.

The potential effectiveness of a WFIP was much reduced by being a one-off event cut off from possible future change. This was especially so if no attempt was made to explore with customers the possible parameters of future change, in order to encourage returns to the Jobcentre Plus office should circumstances alter.

In a small number of cases these changes had prompted returns to the Jobcentre Plus office to seek further advice from advisers, though in most instances this had not taken place. It appeared that some opportunities were, therefore, being missed with caring partners through de facto waivers or short WFIPs; through the widespread unwillingness or inability of advisers to address the complex detail of caring situations; and through an immediate perspective on WFIPs which ignored longer-term change and possibilities.

Furthermore, those who had managed to enter work had gone mostly into part-time jobs that were not well sustained. The evidence suggests that the constraints these carers needed to overcome in order to work were real and considerable, and that despite a strong will to re-enter the labour market, carers often found constraints to be too great to negotiate successfully or sustainedly. Couples caring for a child with special needs, disabilities and/or behavioural difficulties found it particularly hard to enter or sustain employment.

5.6.4 Partners whose first language is not English

Although attitudes to the WFIP itself were sometimes less positive among partners whose first language is not English (as noted in Section 3.11), there were some positive findings related to the impact of the programme. Specifically:

• these partners were more likely than average to say the advice had improved their skills and increased their confidence;

• within the group of partners who were looking for work, those whose first language was not English were more likely to say the WFIP had improved their chances of getting a job.

5.6.5 Older partners

Older partners were less likely than average to say their skills had been improved, or to feel more hopeful and motivated, as a result of the WFIP.

Some advisers perceived that this older group of partners was more difficult to persuade of the benefits of changing their situation and considering work. There appeared to be a poor perception of this age group among some advisers, despite
the fact that some partners over the age of fifty can access additional help via New Deal 50 Plus. Some opportunities relating to partners in the older age ranges were not being identified and picked up by current Jobcentre Plus practices.

5.6.6 Partners of JSA claimants

As well as the key sub-groups, there was also a policy impact on partners of JSA claimants, who were often more positive towards the impact of WFIP/NDP, specifically with regard to improving job prospects, improving skills, making them more hopeful and motivated, and increasing confidence. Among partners who were looking for work, JSA partners were also more likely to say the WFIP had increased their awareness of job opportunities.
6 Assessment of current strategy

Summary

• As well as not succeeding in meeting most of its objectives, the programme is not currently cost effective.
• Lack of success can be attributed to inherent complexities in the partner customer group, and the inability of current Work Focused Interviews for Partners (WFIPs) or New Deal for Partners (NDP) to address their particular circumstances.
• Positive elements of the programme were identified, including the benefits of joint interviews, the support for those moving into self-employment, and more generally the role of WFIPs and NDP in building confidence and raising awareness of the help available.

6.1 Cost benefit analysis

The previous chapter has indicated that WFIP and NDP have not succeeded in meeting the main objectives. In addition, cost benefit analysis shows that the programme is not currently cost effective. According to this analysis, the additional net benefits overall from NDP and WFIP respectively for the period April 2005 to March 2006, were:

• Minus £1,200,000 to the exchequer; and
• Minus £1,100,000 for the economy;
• The additional net benefits to the exchequer per additional job entry were minus £16,700 and minus £15,300 for the economy.

The net exchequer benefits by stock and flow were:

• Minus £800,000 for the stock; and
• Minus £500,000 for the flow.
The reasons for the lack of success of the programme are discussed in detail below. In general, the net benefits to the economy and the exchequer are dependent on the type of jobs that partners move into. If the non-working, non-participating partners move into high paid work, and work full-time hours, then the benefits to the economy will be more in terms of reduction on benefits and increased taxes. In fact, work is often low paid with part-time hours. This results in small gains to both the exchequer and the economy, against large payouts in the form of tax credits.

In addition, the analysis may underestimate the negative costs of the programme. This is because the analysis is linked to the impact estimates based on benefit exits. The cost-benefit analysis assumes that all of the benefit exits from the programme translate directly into job entries. However, as noted in Section 5.1, this is unlikely to be the case. Therefore, the analysis potentially over-estimates additional job entries and, by extension, the benefits of the programme. It should also be noted that the estimates are created for a six month period and the analysis assumes that the same estimates apply for the 12 month analysis.

6.2 Problems facing the programme

6.2.1 Partner characteristics

Many of the difficulties experienced relate to the customer group. Firstly, for most partners, including those looking for work, there are a number of barriers to starting work, including health problems or disabilities, childcare and other caring responsibilities. Often barriers are multiple.

The role of the main claimant is also important. The need to view the partner’s situation alongside that of the main claimant often increased the level of complexity that needed to be tackled in the WFIP or NDP interview. In addition, opposition and resistance to the aspirations and intentions of partners from the main claimant was felt to be a major factor in the difficulties experienced by advisers in dealing with the partner customer group at all stages of the process.

Partners who had not worked for many years, or perhaps never worked at all, were often highly apprehensive at the prospect of work, and required significant amounts of confidence building and constant motivation and reassurance. There was frequently a deliberate element of confidence boosting involved in referrals to training, and many partners saw the opportunity of doing short hours training courses as a manageable ‘step’ towards getting a job. The main problem facing advisers was judging when and if such partners would really be ready and willing to move into work.

Part-time work is often the preferred/only option. The lack of sufficient jobs of this type in local labour markets was perceived to be an important factor preventing more successful outcomes being achieved.
Finally, a key aspect to the difficulty of dealing with partners is the fact that in many instances, the Better Off Calculations (BOC) showed that they would not be financially better off in work. This significantly weakened one of the most powerful tools that advisers had available in the WFIP/NDP programme.

6.2.2 Delivering the strategy

Overall there was evidence of a drawing in and narrowing of approach to WFIPs as the programme continued. WFIPs had become increasingly brief, often with the clear intent of doing only the minimum required.

However, complaints from some partners of being rushed through interviews provided evidence that perhaps some opportunities were being missed by advisers who were too readily dismissive of the client group, albeit in the interests of pursuing efficiency and good time management. By the same token, other advisers thought that half-hour meetings reduced effectiveness and weakened the potential value of the persuasive elements of the WFIP.

Over time, WFIPs were accorded an increasingly lower priority by Jobcentre Plus staff and managers and advisers showed no ‘ownership’ of the customer group. Contact with case loaded partners on NDP was also often minimal and limited to jobsearch and Tax Credits administration support.

Different ‘types’ of customers are categorised (and target points weighted accordingly) in line with ministerial priority and according to input expected to be needed from advisers to move them into a job. In the highest priority groups (for example, lone parents) a job entry is worth 12 points. The job entry for a partner is currently worth eight points. Each office will have an overall target to meet in the year. Managers confirmed that the weighted points system effectively ensures that available resources get aimed at the highest priority groups. However, there was a perception among many managers and advisers that the value of a partner job entry did not accurately reflect the level of effort required to achieve it. Some suggested that partners should be included in the higher (12 points) category.

Advisers who persisted in applying considerable time and effort to getting partners into work, frequently said they did so ‘despite’ its detrimental effect on their personal performance assessment. The logic of a targets driven system, therefore, was found to be working against the success of WFIP/NDP. In addition to reinforcing perceptions of the ‘difficult’ nature of the partners customer group, it was also felt by some to be undermining customer service and adversely affecting adviser morale.

The already low numbers of partners coming into Jobcentre Plus offices for WFIPs was spread even more thinly across advisers than was originally the case, undermining the apparent need for additional adviser training and preventing much accumulation of specialist expertise. Numbers of partners on NDP case loads were even smaller. In extreme cases advisers had not case loaded a single partner in the previous 12 months.
While the complexity of partners’ circumstances was widely acknowledged, there was no evidence of any initiatives being undertaken to address these real and acknowledged complexities. Even with partners who had expressed interest in working and had been case loaded onto NDP, advisers continued to experience difficulties in addressing complexities whose roots often lay within a couple’s relationship and were compounded by conflicting concerns and aspirations.

Apart from some early ‘teething troubles’ in the administration and booking of appointments for partners, most of the delivery problems associated with the WFIP initiative stemmed from the nature of the customer group and staff reactions to it.

Generally, negative views and low expectations held by advisers prevailed, and appeared to have hardened over time. Despite some employment outcome successes with partners on NDP, the negative perceptions engendered by the WFIPs process had to an extent carried over into NDP work.

The small scale of primary job outcomes from the initiative, and the low rate of entry to NDP, reinforced a negative view of WFIPs among many advisers and appears to be fuelling the self-fulfilment of low expectations.

Support provision available under the enhanced NDP was seen as offering more to partners than the previous programme, but not perceived as enough to overcome the additional difficulties most partners faced. Many advisers had approached partners in the expectation that they would respond comparably to, say, lone parents (an expectation also implicit in policy) and had been disappointed to find that generally they had not done so. Enhancements had not encouraged large numbers of additional partners onto NDP compared to previously.

6.3 Positive aspects of the programme

Chapter 5 described how WFIP and NDP had some success in building self confidence. A large proportion of the target group are not in a position to work at the time of the WFIP, but the majority are positive towards the possibility of work when circumstances permit. Increasing partners’ confidence may only be an initial step towards employment, but this is still important in helping to increase the chances of a return to work at an appropriate time.

In addition, half of those that did not expect to find the WFIP helpful actually did so, and the majority overall found the WFIP helpful. The WFIP was therefore helping to create a greater awareness of the help available and build a positive impression of Jobcentre Plus.

In addition, the evaluation found that in most cases, joint WFIPs were a positive experience for partners and main claimants. A joint interview is often necessary to understand the circumstances of both the partner and main claimant, as well as the ‘couple dynamic’, before providing useful advice. In addition, the main claimant can often usefully assist the partner during the interview, and the WFIP may indirectly
help job-seeking main claimants find work (thereby reducing the number of workless households). The caveats to this positive feedback are that joint WFIPs were not seen as appropriate for everyone (particularly partners caring for the main claimant, a substantial proportion of the total partners group), and that advisers often felt lacking in experience or training to carry out joint interviews effectively.

One successful element of the programme was in moving partners into self-employment support. Partners who had successfully moved into self-employment were among those most positive about NDP, and the most eloquent in describing the beneficial effects that working had brought to themselves and their families.
7 Potential options for future direction/recommendations

This chapter considers options for the future of Work Focused Interviews for Partners (WFIPs) and New Deal for Partners (NDP). These are grouped into three categories:

- improvements to current delivery;
- enhancements to current strategy;
- changes in the strategy.

Items in the first two of these categories will remain relevant under any new strategy, as they contain lessons that will apply to any partner intervention.

7.1 Improve delivery of current strategy

The evaluation suggests it is worth maximising the number of joint interviews, or to pursue a model, already operating in practice, whereby an initial single WFIP is followed by a joint meeting at which a Better Off Calculations (BOC) is carried out. It is clear from the evaluation that the invitation letter can have a major impact on how both partners and main claimants see their involvement in joint interviews. The wording of the letter is therefore critical to any attempts to maximise joint attendance, and in encouraging a favourable disposition among both main claimants and partners.

The initiative was clearly being treated as a relatively low priority in most Jobcentre Plus offices. One response to this would be to raise the points for a partner job outcome to the highest priority level. This may go some way towards increasing motivation to deal effectively with partners and help raise the priority of the customer group.
A key area raised by the evaluation is the adviser training. Areas where additional training would be effective are:

- specialist training and guidance to advisers in dealing with particular partner characteristics and barriers to work (e.g. caring and disability);
- training in conducting BOCs;
- training in conducting joint interviews.
- identifying job vacancies where part-time work and/or flexible working are feasible. Several partners complained that in spite of emphasising to their adviser the reasons for needing particular hours or patterns of work, they continued to be sent details of jobs that did not meet their requirements and were therefore unsuitable. This is also part of a larger issue, relating to the prominence and accuracy of this information in job vacancies; the awareness of advisers of these types of vacancies; and (more generally) the ability of Jobcentre Plus to negotiate for more job flexibility with employers. This was an issue highlighted in the recent Harker report.

In addition, it may be possible to allocate existing advisers more effectively according to their experience. This could include using ‘specialist’ Incapacity Benefit (IB) and Jobseeker’s Allowance (JSA) advisers to deliver WFIPs to the partners of customers of these types of benefits.

Irrespective of the training and experience of advisers, there is also a need to build better referrals to specialist agencies, so that issues relating to disability and caring in particular can be addressed more directly.

7.2 Enhance current strategy

The possibility of review meetings should be considered, in order to help improve long-term support. It is clear that many partners need support over a long time-frame, and are also often not in a position to benefit greatly at the time of their initial WFIP. There was tentative support from a number of advisers for the idea of review meetings or further mandatory interviews.

There were also calls for a more structured approach to inactive caseloads (i.e. keeping details about partners who said they might want support at a later date and contacting them by telephone at a time when they had said they expected to be ready to take action). As seen in Section 4.2.1, at present, advisers currently make their own arrangements for keeping in touch with partners: for example, some advisers were keeping contact details about partners who said they might want support at a later date, and then contacting them by telephone after three or six months or at a time when they said they expected to be ready to take action. This initiative shown by some advisers would seem to potentially be an effective forward thinking approach – but is not currently supported by Labour Market System (LMS).
At present, there is little financial incentive for many couples to move into work (as seen in Sections 3.9.2 and 4.7.1, when BOCs show couples to be worse off in work). Increased and/or additional financial incentives could be considered, covering both the transition from benefits to work and on-going in-work benefits. Otherwise, it will be difficult to address this fundamental problem.

There is also considerable reluctance to using formal childcare, and this needs to be addressed in order to move a substantial proportion of couples out of poverty. This could be done by greater use of existing subsidies and/or additional training for advisers, as well as greater financial incentives, as suggested in the Harker report.

7.3 Change current strategy

There was some support among advisers for the idea of potentially excluding certain partners (such as those caring for the main claimant) from WFIP eligibility, and for treating the mandatory meeting as a form of rapid ‘sift’ of remaining partners prior to NDP. This approach would help minimise unproductive effort, although there would be a danger that policy objectives would be sidestepped by any such moves. Around a third of partners cannot see any possibility of work, even in the future, so potentially these partners could be excluded.

However, it would be important for the sifting process to be sufficiently sensitive to distinguish these partners from those who, although currently unable to work, would consider doing so in the future. Otherwise, achieving movement towards the labour market in the longer term could be lost, and the opportunity to encourage and support the small numbers of partners unsure about working but willing to be persuaded, would be greatly reduced. In this context, it is worth re-iterating that many partners said the WFIP had increased their confidence even when they had no prospect of returning to work. Thus the use of a small number of specialist advisers who were trained to work with those partners who had been sifted out from the main process (for example, carers) could be considered as a way of ensuring that these partners were not excluded from the system altogether.

Alternatively, it may be possible to consider different approaches to partners, according to their proximity to work. While the current Work Focused Interview (WFI) model is appropriate for more job-ready partners, for others a gradualist approach is more appropriate. This would involve focusing more on longer-term prospects and options for partners and supporting preparation and development activities during the time they are unable to work. This would make them better prepared for employment when their circumstances change (and work they eventually enter will be more likely to be well sustained). This could include a focus on training that is relevant to partners but also convenient for them to attend (in

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terms of hours and flexibility). Overall, an emphasis on skills rather than employment is likely to be more beneficial to this group, and would be in line with current policy, as outlined in the Leitch review. Ultimately, it should be borne in mind that in any new approach to this customer group a longer-term strategy is necessary: as noted in Section 3.2.1, advisers pointed out that whilst immediate job entry may not always be a possibility, job outcomes were likely to be achieved further down the line if a medium to long-term focus were adopted.

Most importantly, support needs to have a family focus, providing integrated support for the couple and family as a whole, rather than individuals. It is only by taking adequate account of the real difficulties and insecurities many partners face, both domestically and in the labour market, that policy objectives are likely to be met. This is a key message of the Harker report, and the findings of this research support this emphasis on a family focus9.

On a practical level, this could involve approaching the partner through the main claimant, rather than as a ‘free-standing’ separate customer group. Advisers felt that there was already much evidence from the IB Pathways pilots that all partners might profitably be approached via the main claimant rather than ‘in isolation’.

However, it will be important to use this approach to improve the focus of the support, rather than purely as a cost-saving measure by simply tagging partners on to existing Jobcentre Plus interviews for main claimants. It will also be important to consider those partners for whom a joint interview may be less appropriate; this includes partners caring for the main claimant, a large proportion of the total partners group.

Such a change would be in line with current policy targeting the reduction in child poverty. However, for such a change to be effective, it will need to include substantive elements that can make families better off financially, by:

- increasing the numbers of couples where both are in work or at least one is in full-time work; this is likely to require greater use of formal childcare;
- providing training that is flexible to current circumstances but can also provide skills that will help a future move into better paid, sustained work.

A structure will also need to be in place to encourage Jobcentre Plus staff to provide advice and support as effectively as possible, by providing appropriate training, resources and rewards for successful outcomes.
