Over 50s Outreach Pilot: qualitative research

Dr. Gerwyn Jones and Rita Griffiths

A report of research carried out by Insite Research and Consulting on behalf of the Department for Work and Pensions
## Contents

Acknowledgements ........................................................................................................ v

The Authors ................................................................................................................... vi

Abbreviations ................................................................................................................ vii

Summary ......................................................................................................................... 1

1 Introduction ................................................................................................................... 7
   1.1 Labour market participation of people aged 50 and over ..................... 7
   1.2 The Over 50s Outreach Pilot ............................................................... 8
   1.3 Research aims and objectives .......................................................... 9
   1.4 Research methods ........................................................................ 10
   1.5 Report structure ........................................................................ 11

2 Pilot design, implementation and management ....................................................... 13
   2.1 Successful contractors ................................................................. 13
   2.2 Pilot approaches and outcomes .................................................... 14
   2.3 Outreach workers’ skills and attributes ...................................... 15
   2.4 Contract management ............................................................... 16
   2.5 Customer tracking processes and procedures ............................ 18
   2.6 Referral and advice processes and procedures ......................... 19
   2.7 Timing ....................................................................................... 21
   2.8 Summary: Best practice and lessons learned ............................ 24

3 Pilot activities and methods .................................................................................... 25
   3.1 Promotional and outreach activity .............................................. 25
   3.2 Newspaper and magazine advertising ...................................... 28
   3.3 Radio advertising ..................................................................... 30
   3.4 Bus advertising ......................................................................... 30
   3.5 Promotional events and activities ............................................. 31
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## Abbreviations

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tbody>
<tr>
<td>DEA</td>
<td>Disability Employment Adviser</td>
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<td>DPQMT</td>
<td>District Programme Quality Monitoring Team</td>
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<td>DWP</td>
<td>Department for Work and Pensions</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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<td>LMS</td>
<td>Labour Market System</td>
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<td>SDA</td>
<td>Severe Disability Allowance</td>
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<td>State Pension Age</td>
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<td>WBLA</td>
<td>Work-Based Learning for Adults</td>
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Summary

Background

The Pensions Green Paper ‘Simplicity, Security and Choice: Working and Saving for Retirement’ published by the Department for Work and Pensions (DWP) in December 2002 set out Government proposals for supporting people in their 50s and 60s in work and for creating opportunity and choice to enable them to work for longer. The proposals incorporated a package of measures designed to stimulate the economic and social inclusion of older people.

The Green Paper also undertook a commitment to pilot new approaches to the delivery of welfare-to-work services. This commitment came as a response to the difficulties experienced by Jobcentre Plus in engaging people from the over 50s age group, particularly those on inactive benefits such as Incapacity Benefit (IB) and Income Support (IS).

The primary objective of the Over 50s Outreach Pilot was for external organisations with previous experience and an innovative approach to engaging with economically inactive people, to raise awareness and encourage the use of Jobcentre Plus back-to-work services among the over 50s. The main target group was people in receipt of inactive benefits who have no contact with Jobcentre Plus. However, the scope of the pilot also included any individuals who were interested in paid or voluntary employment and would benefit from Jobcentre Plus services, regardless of whether or not they were in receipt of benefits or above state pension age.

Insite Research and Consulting was commissioned to carry out a qualitative research study to examine the operation of Jobcentre Plus’ Over 50s Outreach Pilot. The study was not intended to evaluate the outcomes or impact of the pilot but rather to describe how pilot projects were implemented and delivered, to explore the methods used by external organisations to promote contact with Jobcentre Plus and to assess the effectiveness of the pilots in raising awareness and encouraging the use of back-to-work help among older people. The overall aim was to identify best practice and lessons learned in the delivery of the pilot.
Implementing and managing the pilot: Best practice

The degree to which Jobcentre Plus district teams engaged with the pilot varied significantly across the different districts, from active ‘hands-on’ involvement in the design and delivery of the pilot, through to a ‘hands-off’ contract management role. These differing degrees of involvement impacted on the conduct and success of the pilot. Pilot projects with greater integration and involvement between the providers and Jobcentre Plus generally fared better than those where relationships were more distant.

A key lesson learned in relation to setting up and managing future pilots was that successful outcomes resulted where clear, mutually supportive objectives and encouraging strong communication links were set up from the outset between Jobcentre Plus and contracted providers. In districts where this occurred, providers and Jobcentre Plus were clearly working towards a common goal, which led to good working relationships and quality customer service. Where this did not occur, there was a lack of clarity and co-ordination between pilot providers and Jobcentre Plus staff as to which individuals should be referred to Jobcentre Plus, resulting in tensions and poor working relationships between the parties.

A key constraint for the pilot was the timing of its implementation, coinciding with major structural and policy changes within Jobcentre Plus, some of which ran contrary to the main aims and objectives of the pilot. In the period between the announcement of the pilot and its conclusion, many Jobcentre Plus offices had centralised services, staff had reorganised and efforts were refocused around priority groups of benefit customers. In most districts, advisers simply did not have the time to spend with people over state pension age or not in receipt of benefit. Getting the timing of the pilot right and ensuring a good degree of ‘fit’ with wider policy developments and objectives, therefore appears to have been a key lesson learned.

Methods used to engage the over 50s: Best practice

Providers adopted very different approaches to the delivery of the pilot and the methods used to engage the over 50s. Some implemented general, ‘broad brush’ marketing and outreach strategies, while others focused on more targeted, one-to-one information and advice services. Generally, the more targeted the marketing and the more personalised and tailored the outreach service to the specific needs of individual customers, the more effective it was.

Advertising methods that more successfully raised awareness and stimulated interest among the target group appeared to be newspaper and radio advertising. The least effective methods were deemed to be general leaflet drops and poster campaigns.
Themed outreach events and ‘one stop’ jobs fairs specifically aimed at older people looking for work, training or volunteering opportunities were identified as being particularly effective methods. Using older people as outreach workers also worked well in helping to build trust and break down customer barriers; outreach workers who were more mature adults themselves were generally better able to identify and empathise with older adult customers. Other effective approaches included small discussion groups and group workshops. Meeting customers on their own territory and in neutral and accessible community settings where they felt comfortable, was another important factor in engaging this group. Practical assistance, including ‘meet and greet’ services, mentoring and ‘hand-holding’ services were also much appreciated by customers over the age of 50.

Overall, outreach methods which encouraged a more personalised service based on face-to-face contact and delivered one-to-one, together with approaches which provided direct access to jobs, training and volunteering opportunities, produced the most effective customer engagement. Individuals were perceived to respond better when services and events were specifically targeted at the over 50s and where there was a strong presence of employers. In particular, outreach methods that encouraged links with Age Positive employers were deemed to have worked well at engaging the more job ready.

**Pilot respondents: Best practice**

Overall, irrespective of the methods used, the experience of all pilot providers, was that the number of individuals in the target group who responded and were referred to Jobcentre Plus was lower than anticipated. Of all the different categories of the over 50s, those in receipt of inactive benefits, particularly longer term, appeared least likely to respond to the marketing and outreach approaches of providers. Concerns that enquiring about work would result in the loss of benefits was highlighted as a key barrier preventing these individuals from engaging with Jobcentre Plus. Pilot providers that were perceived as ‘trusted organisations’ and specialists in the over 50s field seemed to have fared better than others at attracting those on inactive benefits.

People over state pension age and those not in receipt of benefits responded in the greatest numbers. Many wanted pensions, benefits or volunteering advice but had no interest in work. Providers overselling what Jobcentre Plus could realistically offer to such individuals appeared to be a key reason, together with a possible flawed understanding on the part of some providers as to what was the main purpose of the pilot. Some providers were referring any and all 50 plus individuals, irrespective of whether or not they might be interested in work. Not unsurprisingly, this caused tensions and poor working relationships between Jobcentre Plus and some contracted providers.

Among the large and important group of pilot respondents who were interested in employment, a significant proportion were above state pension age and in receipt of
an occupational or state pension. People above state pension age were rarely looking for full-time work, with most wanting a part-time job to ‘top-up’ their pensions and to keep themselves mentally and physically active.

Providers offering direct links to volunteering opportunities reported having some success. Though individuals at or above state pension age were mostly interested in voluntary work for social and altruistic reasons, those below state pension age often perceived voluntary work as a means of gaining valuable experiences in terms of possible future employment.

Stigma, personal pride, a fear of the unknown, coupled with out dated images and perceptions of the types of places jobcentres were deemed to be were key barriers preventing older individuals from accessing the service. Where a more personalised, face-to-face and friendly service had been provided, these barriers were more likely to be overcome. In some cases, respondents who had been referred acknowledged the positive changes and improvements that had occurred within Jobcentre Plus and indicated that they would be more willing to use their services again in the future.

The pilot clearly evidenced a demand for employment, training and voluntary opportunities among the over 50s not on benefits. Many such customers had taken early retirement or been forced to leave a job due to ill-health but were keen to find alternative work. With little or no previous contact with Jobcentre Plus, many were highly receptive to the approaches of pilot providers. On the face of it, those with recent work experience, a solid employment history and transferable skills may appear better placed to help themselves, requiring little input or involvement from Jobcentre Plus. However, many needed quality information and advice on training and jobs as part of a change of career. Jobs fairs were particularly useful in assisting the job ready but for individuals needing to retrain for a new job or career, there appeared to be little help available.

Lessons learned and policy implications

Given the very low response among the main target group, there was little evidence to support the view that contracting out the marketing and awareness raising functions of Jobcentre Plus to independent intermediary organisations was any more successful in securing the engagement of 50 plus customers in receipt of inactive benefits, than Jobcentre Plus. This suggests that while using an intermediary organisation can help to break down the barriers to jobcentre usage among people with a limited history of claiming benefits, it appears to make little difference to inactive benefit claimants.

Persuading older adults in receipt of inactive benefits to use Jobcentre Plus services may, therefore, first require convincing them that a return to work is financially viable. No amount of awareness raising or outreach may be effective in encouraging such customers to take up the offer of Jobcentre Plus back-to-work help without the prior knowledge and reassurance that they will not be worse off in work. In this respect, what may have been more useful to pilot would have been a targeted marketing or advertising campaign which sought to get this key message across.
Another approach may have been for providers to have offered better off calculations (BOCs) and information and advice on permitted work, benefit protection and other financial incentives designed to help in the transition from benefits to work. It is only through having access to this type of information that people will understand that they might be better off in work, or that they can try work without risking the loss of their benefits if the job is not sustained.

On the other hand, in so far as Jobcentre Plus is unable to distance itself from its benefit policing role, the only effective means of encouraging target benefit customers to access Jobcentre Plus back-to-work services, may be through a mandatory Work Focused Interview (WFI) which includes a BOC. What is interesting from the perspective of the Over 50s Outreach Pilot, is that with the introduction of mandatory WFIs and roll out of the IB Pathways to work Pilots, this lesson appears to have already been learned.
1 Introduction

1.1 Labour market participation of people aged 50 and over

In contrast with many other groups, labour market participation amongst men aged between 50 and the state pension age has decreased significantly over recent decades. As a group, the over 50s are much more likely to be long-term unemployed or out of work through ill health than those aged 18-49. Employment rates for men aged over 50, in particular, have fallen dramatically since the mid 1970s, although the decline may now be reversing. Nine-tenths of those out of work between 50 and state pension age are now economically inactive, with around one in seven of the age group claiming incapacity benefit. Seventeen per cent of Jobseeker’s Allowance (JSA) claimants are also aged 50 or over.¹

These trends in workforce participation have coincided with a shift in the demographic composition of the United Kingdom’s (UK’s) population. Approximately 20 million UK residents are currently aged 50 and over and this is set to rise to around 29 million by 2041. This widening gap between the age at which people exit the labour force and increased life expectancy means a growing period of dependency on income derived from the state and private pensions.

The challenge posed to policy makers is how to actively engage with the over 50s to help them to stay in work longer or return to work, particularly from inactive benefits. Recent literature and research² has highlighted the need for a review and revision of welfare, pensions and labour market policies. Such policies need to be directed towards both training and developing older workers, enabling their services to be retained longer by employers, but also towards welfare-to-work provision for those outside the workforce, who either need or would like to re-enter employment.

1.2 The Over 50s Outreach Pilot

The Pensions Green Paper ‘Simplicity, Security and Choice: Working and Saving for Retirement’ published in December 2002, set out the policy challenge and presented Government proposals for supporting people in their 50s and 60s in work and for creating opportunity and choice to enable them to work for longer. The proposals incorporated a package of measures designed to stimulate the economic and social inclusion of older people including:

- encouraging employers to recruit and retain older workers;
- tackling age discrimination in the workforce;
- increasing incentives for individuals to work longer;
- providing opportunities for flexible retirement;
- improving and intensifying back-to-work help for the over 50s.

The Green Paper also undertook a commitment to pilot new approaches to the delivery of welfare-to-work services. This commitment came as a response to the difficulties experienced by Jobcentre Plus in engaging people from the over 50s age group. Research has shown that although many people over 50 would like to go back to work, very few seek help from Jobcentre Plus.\(^3\) Of the 2.7 million people aged between 50 and 65 who are not in work, only about 200,000 have any form of contact with Jobcentre Plus.\(^4\) The majority of these are in receipt of JSA; only two per cent of people on inactive benefits such as Incapacity Benefit (IB) and Income Support (IS), currently respond to approaches from Jobcentre Plus.

The Green Paper acknowledged that contact from Jobcentre Plus can often worry people, particularly those on IB and Severe Disability Allowance (SDA), who, possibly in poor health, may be concerned that they will be forced back into work or that their benefits may be reduced. The use of an external intermediary organisations to help market Jobcentre Plus services on an outreach basis was considered to be one possible means for addressing these concerns.

Outreach may broadly be defined as ‘as a means of providing a service that involves taking the service out and away from its usual (central or) institutional setting and providing it in other locations and environmental settings.’\(^5\) In relation to welfare-to-work services, outreach may include:

- awareness raising and marketing activity to inform, attract or engage customers in order to encourage the use of welfare-to-work services;

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\(^3\) Irving et al. (2005).

\(^4\) Internal DWP analysis.

• delivering welfare-to-work services out in local community settings;

• a networking process whereby service providers work in partnership with other local stakeholders to promote and deliver welfare-to-work services to people in local communities.

The Over 50s Outreach Pilot was set up primarily to meet the first of these objectives, as an information, awareness raising and referral mechanism for encouraging the use and take-up of Jobcentre Plus services.

The primary objective of the Over 50s Outreach Pilot was for external organisations with previous experience of engaging with economically inactive people to raise awareness and encourage the use of Jobcentre Plus back-to-work services among the over 50s. Their remit was to:

• design and deliver innovative initiatives, aimed at people aged 50 and over on inactive benefits and economically inactive people aged 50 and over, to raise awareness of Jobcentre Plus services, and encourage these key target groups to use Jobcentre Plus services;

• act as referral agents to Jobcentre Plus advisers;

• help IB, SDA and IS customers overcome any concerns they may have that their benefits may be affected if they approach a Jobcentre Plus office with a work related enquiry.

The aim of the pilot was to gather information about best practice in ways of extending information about back-to-work help, jobs and volunteering to jobless people over 50 in receipt of inactive benefits, but also to those not in receipt of benefits.

Twelve potential UK locations were identified which contained particularly high numbers of the target client group. Following a competitive tendering exercise, seven external intermediary organisations (or pilot providers) were selected to operate pilot projects delivering diverse approaches to awareness raising across seven different Jobcentre Plus districts in England, Scotland and Wales. The pilot went live in April 2004 and ran for two years until March 2006.

1.3 Research aims and objectives

In November 2005, Insite Research and Consulting was appointed by the Department for Work and Pensions (DWP), to carry out a qualitative research study to examine the operation of Jobcentre Plus’ Over 50s Outreach Pilot. The study intended to describe the methods and approaches used and to assess their relative success in

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6 The original list of proposed Jobcentre Plus districts were Lanarkshire, Liverpool, Leeds, Wigan, City of Sunderland, Bradford, Fife, Staffordshire, Dudley and Sandwell, Newcastle and North Tyneside, Eastern Valleys, Cardiff and Vale.
encouraging people who would not otherwise have engaged with Jobcentre Plus to use their services. Its primary aim was to identify best practice and lessons learned, thereby contributing to the continuous improvement of Jobcentre Plus services.

The research project was not intended to evaluate the outcomes or impact of the pilot but rather had the following key objectives:

- to describe how the pilot projects were implemented and delivered;
- to identify the methods and processes used by external organisations that were successful or otherwise in extending information and encouraging people to make contact with Jobcentre Plus;
- to record the views and experiences of key informants including Jobcentre Plus staff, pilot providers and over 50s customers, regarding the effectiveness of the pilots in raising awareness and encouraging the use of back-to-work help among older people;
- to explore what worked well, what did not and why;
- to identify best practice and lessons learned in the delivery of the pilot.

1.4 Research methods

Qualitative research methods were adopted to carry-out the study and to meet the research objectives. These comprised a series of in-depth, face-to-face interviews with key individuals involved in the pilot programme. Five of the seven pilot districts were selected to ensure geographic coverage across Welsh, Scottish and English regions.

The fieldwork began in December 2005 and was completed by February 2006. It incorporated three key elements: in-depth, face-to-face interviews with:

- five Jobcentre Plus DPQMT7 staff and five Jobcentre Plus advisers involved in the procurement, management and delivery of pilot projects;
- ten key staff from contracted providers involved in the management and delivery of pilot projects;
- 12 customers who responded to the approaches of pilot providers.

A total of 32 in-depth face-to-face interviews were carried-out across five of the seven pilot districts. All interviews were tape recorded and transcribed for analysis and reporting purposes. Verbatim quotes used in the report appear in italics.

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7 District Programme Quality Monitoring Teams (DPQMTs) provided the contract management role for the pilot in each of the districts. These duties included undertaking quality assurance checks; performance reviews and providing liaison between the contracted providers and Jobcentre Plus staff.
1.5 Report structure

This report is written in four further sections, as follows:

**Chapter 2** describes how the pilot projects were designed and implemented.

**Chapter 3** explores the marketing and outreach methods used by pilot providers and their effectiveness in reaching and engaging the target client group.

**Chapter 4** examines which customers responded to the approaches of pilot providers and why and presents their experiences and views of the help and advice they received.

**Chapter 5** summarises key findings and conclusions.

The report also has three appendices:

**Appendix A** summarises the research methods and analysis process.

**Appendix B** includes the customer opt out letter and form.

**Appendix C** includes the topic guides used for the fieldwork.
2 Pilot design, implementation and management

This chapter considers how contracted providers approached the design and delivery of their projects, explores how the projects were implemented and operated ‘on the ground’, the staff they appointed and referral practices and procedures. It also examines the role of Jobcentre Plus including how pilot projects were procured and managed and the extent to which local Jobcentre Plus offices and staff were involved in their delivery.

2.1 Successful contractors

Although the stated policy intent of the Government’s consultation paper was to ‘pilot work with voluntary sector organisations to extend information about back-to-work help and local jobs and volunteering opportunities’, European Union law and UK Government procurement policy required the tendering process to be open to all. This may have disadvantaged organisations that had no prior experience of public sector competitive tendering and of Jobcentre Plus, as the successful tenders were mainly from organisations in the public or private sectors with existing or recent Jobcentre Plus contracts.

Of the five organisations involved in the research study, one was a voluntary sector organisation; two were private companies, one was a local authority, and one was a registered social landlord.

Both private sector organisations had significant experience and specialist skills in delivering large Department for Work and Pensions (DWP)-funded employment programmes and both had delivered Jobcentre Plus contracts in the past. Their experience of dealing with the over 50s was predominantly focused on those in receipt of active benefits required to participate in mandatory programmes. The local authority had well established skills and experience of running Jobcentre Plus
contracts and had delivered Progress to Work and mentoring contracts. Similarly, the housing association had experience of delivering Government and European funded regeneration and employment programmes and had worked with Jobcentre Plus in the past on New Deal 18-24 and the ethnic minority outreach programmes. Although it had no particular specialism in working with the over 50s, this organisation had good local and regional networks and was familiar with partnership working. One of the five successful contractors met the original intention of the Government’s Green Paper (2002), specialising in services for the over 50s and coming from the voluntary sector. Unlike the other providers, they had had no prior dealings or contracts with Jobcentre Plus programmes, although they had a strong proven track record and experience in delivering services and programmes specifically aimed at the over 50s.

2.2 Pilot approaches and outcomes

The broad objective of the pilot as set out in the Invitation to Tender (ITT) document was ‘to extend information about back to work help and local job and volunteering opportunities to help improve employment prospects of jobless people aged 50 and over’. In this respect, the pilot’s remit was designed to meet the first of Dewson’s types of outreach, that is, ‘awareness raising and marketing activity to inform, attract or engage customers in order to encourage the use of welfare-to-work services’.

The intended focus of the pilot was primarily on people in receipt of inactive benefits with no Jobcentre Plus contact, although it was not the intention to exclude those not in receipt of benefits. Providers estimated in their bids the number of 50 plus customers they expected to engage and refer. In some cases, these figures were increased or decreased as part of contract negotiation.

Provider background and experience of delivering Jobcentre Plus programmes did not appear to have a strong bearing on how they set about their marketing and awareness raising activity. Indeed, providers initially approached the pilot in remarkably similar ways, starting with fairly standard ‘broad brush’ marketing approaches which included leaflet drops and posters, operating stalls in supermarkets and local community centres, moving on to advertise in local newspapers and specialist over 50s magazines. Some made use of radio advertising. All providers appointed or recruited staff to organise the production of publicity and marketing materials and to perform outreach activities in the local community.

As the pilot embedded and the approaches used failed to yield the level of response providers had anticipated, they began to develop increasingly targeted marketing

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8 A full exploration of the evolution of and thinking behind the different methods and activities of providers, together with a discussion of their relative effectiveness in encouraging the take-up of Jobcentre Plus services, is presented in chapter three.

methods and more tailored outreach approaches. These included giving talks and presentations to over 50s groups, themed events, jobs fairs, surgeries in community venues, meet and greet services to escort and accompany 50 plus individuals to Jobcentre Plus offices and advice sessions and workshops. In spite of differences in approach and emphasis, providers reported similar numbers of people reached through their efforts – in each case around 600 individuals. While contact of this order broadly reflected the targets profiled in providers’ contracts, most acknowledged that the number of referrals from these contacts they were able to make to Jobcentre Plus had been disappointingly low.

In the district with the most comprehensive customer data\(^{10}\), of 616 people contacted through marketing and outreach activity, 171 attended a meeting with a Jobcentre Plus New Deal 50 plus adviser. Of these, 16 moved into work, none of whom were in the target group. Only three of the 171 individuals were in receipt of inactive benefits and eligible for Jobcentre Plus help; one joined New Deal 50 plus, one joined Work-Based Learning for Adults (WBLA) and one joined a programme centre\(^{11}\). Again, there were clear similarities between providers regarding the number and type of referrals to Jobcentre Plus. At the end of the two-year pilot period, few providers exceeded 150 referrals.

### 2.3 Outreach workers’ skills and attributes

Providers recognised that while marketing and advertising may be useful in helping awareness raise, a public interface would be required if they were to reach and engage the target group:

> ‘If you do face-to-face with people, they are more likely to come on board and seeing that you’re just an ordinary real person and you are not somebody aloof sitting behind a desk creating a barrier…That sells it more positively.’

(Provider manager)

Providers appointed mainly one or two staff to work on the pilot, most commonly as ‘outreach’ workers. Some redeployed existing staff from within the organisation to work on a part- or full-time basis; others recruited staff externally. Most providers also had staff undertaking administrative and contract management roles, completing monthly narratives and management information returns and making financial claims. These were generally existing members of staff who combined their work on the pilot with other roles and responsibilities within the organisation.

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\(^{10}\) Difficulties associated with identifying and tracking individuals who attended Jobcentre Plus are covered in Section 2.5.

\(^{11}\) Programme centres are local Jobcentre Plus contracted provision offering further assistance and information to customers with CV writing, job searching, careers advice, IT skills, etc.
The size of budgets and the relative scale of the Over 50s Outreach Pilot compared with other contracted work was the main deciding factor in determining staffing structures. Given the high cost of advertising and publicity, few organisations could afford to employ more than two staff. Employing staff on a part-time or sessional basis provided a way around this constraint and one provider recruited a team of 20 paid ‘volunteer’ workers, giving the pilot project district wide coverage.

Outreach staff had a variety of skills and backgrounds. Some were trained advisers and careers counsellors with a background in helping the over 50s; others were employment programme administrators with no previous experience of advice-giving; others still had professional or managerial backgrounds with limited knowledge of Jobcentre Plus or the benefits system. In only one pilot project area did it appear that outreach workers had a clear understanding of the issues and barriers that can affect individuals in receipt of inactive benefits who are contemplating a return to work.

Although the pilot made up a small part of most providers’ workloads, their wide geographic coverage, coupled with the number of outreach venues they were aiming to reach, meant that in some districts, outreach staff were spread thinly. Outreach workers said that on occasions, they had felt ‘stretched’ and ‘under resourced’. A number of providers believed this was a key reason why the response of the target group had been so muted. The experience of the provider which recruited 20 volunteers to undertake its outreach work would suggest otherwise. This large staffing complement enabled them to implement a district-wide approach, allowing additional outreach venues to be reached and on a more regular basis. Nevertheless, in spite of this wider coverage, this organisation appeared to be no more effective than any of the others in terms of it success in engaging 50 plus customers.

2.4 Contract management

While some DPQMTs took an active ‘hands-on’ approach and worked closely with their outreach provider, others, to varying degrees, were less engaged and operated a ‘low maintenance’ strictly contract management role. DPQMTs that had adopted the former approach were not only actively engaged in contract management, but fulfilled a key function in ensuring the smooth running of the pilot, forging links between the provider and Jobcentre Plus staff, organising training and facilitating the exchange of information and personal contact details. Some even attended pilot activities and events:

‘I monitor the quality side of the contract..., sit in on events, liaise [with the provider]...I cascade information down to the relevant jobcentre staff and explain what activities they need to be involved with. I also meet with [the provider] regularly to undertake performance reviews...’

(DPQMT)
Having a prior working relationship with the successful contractors clearly helped:

‘I already had an established relationship with [the provider] and … it made life so much easier because we both knew each other.’

(DPQMT)

Where providers were new to Jobcentre Plus or working relationships were poor, contractors were left to implement and deliver the pilot alone. Liaison and training was at best ad hoc and providers frequently found that advisers knew very little or nothing about the Over 50s Outreach Pilot:

‘There seemed to be some uncertainty [amongst advisers] what our actual role was… That was an issue with the [Jobcentre Plus] offices when we started the pilot… The only way we could address that was by asking to attend their ‘comms’ meetings… It was a bit of a stumbling block.’

(Outreach worker)

DPQMTs that had adopted a more detached approach explained their approach with reference to the relative size and perceived degree of ‘risk’ attached to the pilot, compared with other contracts they had responsibility for. This level of risk seemed to determine the DPQMTs degree of involvement with the contract:

‘The pilot was low risk… the low risk category determines one to three visits per year… that triggers… the amount of involvement that you have.’

(DPQMT)

Not only was the pilot deemed to be ‘low risk,’ but the fact that contracts were funded on ‘delivery’ rather than the achievement of hard outputs, such as jobs, meant there was little for contract managers to monitor, other than financial claims. In this respect, it is understandable that Jobcentre Plus involvement in some areas was not as high as might have been expected.

Provider staff in these districts felt somewhat cut adrift, feeling that time spent completing narrative reports and monthly return represented wasted effort, and would have valued more contact and feedback from their contract managers:

‘It felt quite isolated… a bit left adrift by Jobcentre Plus, that they’d sort of set [the pilot] up, lit the fuse and withdrawn.’

(Outreach worker)

‘We got very little feedback from our narrative reports… and I never got the sense… that [Jobcentre Plus] were feeling quite as passionately about it as we were… not a great deal of personal contact, which would have been beneficial all round.’

(Provider manager)
Opportunities for sharing good practice and networking during the course of the pilot would also have been valued by providers and Jobcentre Plus staff alike. Although DPQMTs were made aware of the reasons why they were not given the opportunity to do so, some believed the outcomes of the pilot may have been better had such exchanges been encouraged:

‘It would have been useful at some stage in the pilot for the providers to have had an opportunity to meet up at some networking event… There seemed a reluctance [to do that]… I think they were worried that pilots would start to copy from each other.’

(DPQMT)

‘We… were told that the idea was that the pilots were independent and should develop their own learning in their own setting and there was no particular benefit of having… cross-fertilisation… which… was surprising… We really are trying to learn and… make a difference…. and find out what other people do [but] we had no direct contact with the other pilots.’

(Provider manager)

‘…[there has] been a lack of information coming back out from our head office… I don’t know how this pilot has done in comparison to any of the other pilots in the country… it would have been useful to know to gauge how we were doing against our targets compared to other pilots. I’ve found the lack of information difficult at times.’

(DPQMT)

2.5 Customer tracking processes and procedures

The intention was that Jobcentre Plus offices involved in the pilot should set up systems and procedures for tracking customers engaged and referred to them by pilot providers. Only one district appeared to do so. Here, a ‘flag’ or ‘trigger’ was set within the Jobcentre Plus Labour Market computer System (LMS) which, when used in combination with a referral form, enabled 50 plus customers to be identified and tracked. Elsewhere, the process was less systematic. Although providers kept records of individuals attending events and activities, data for those engaged through awareness raising and community outreach was not so amenable to capture. Few providers were comfortable with the idea of asking customers for benefit or national insurance details which would have enabled their details to be matched with those held by Jobcentre Plus. In the event, in these districts, the absence of a trigger made it impossible to differentiate customers who had attended a jobcentre as a result of the pilot from those who had not.

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12 Providers were not given the opportunity to exchange ideas during the course of the pilot’s lifetime as it was felt this would have a diminishing impact on any innovation.
2.6 Referral and advice processes and procedures

The intention of the pilot was that Jobcentre Plus would put in place processes to ensure that customers referred to them were dealt with appropriately, including those not in receipt of benefits. This was to include training and guidance for advisers. In practice, the degree to which Jobcentre Plus engaged with pilot projects varied significantly between districts.

In only one pilot district did it appear that referral and advice processes had been formalised. Here providers and local Jobcentre Plus offices and staff worked collaboratively, with 50 plus advisers taking referrals from providers using specially designed forms. Customers who responded to approaches were guaranteed an interview with a named 50 plus adviser and a list of volunteering opportunities and agencies was drawn up and issued to advisers to distribute to customers with no interest in work. 50 plus advisers also helped to design and deliver a three-day customised training course for seasonal outreach workers. Key elements included briefings on Jobcentre Plus services and programmes targeted at the over 50s, together with practical advice on presentation and selling skills.

In most other districts, pilot projects operated independently of Jobcentre Plus and referral processes were at best ad hoc, at worse non-existent. Little information about the pilot appeared to have filtered through to local offices, less so to 50 plus advisers. It was left to providers to approach individual Jobcentre Plus offices in turn to determine referral mechanisms and to brief and make contact with advisers. The response they received in many areas was not always positive.

Tensions soon emerged due to providers and Jobcentre Plus staff having differing perceptions of what they believed to be the main purpose of the pilot and what was seen to be a poor fit between the pilot objectives and Jobcentre Plus’s role and operations:

‘In the early days [of the pilot]…they were trying to refer people we felt weren’t eligible or fitted the criteria…I don’t think [the intermediaries] remit fitted ours.’

(DPQMT)

‘They were looking [to refer] anybody that was asking for help, including people that needed pensions advice. We did signpost those people, but it didn’t give us outcomes…’

(DPQMT)

Most galling for advisers were those providers which referred any and all customers, regardless of their ambition or capacity for employment:

‘When you are sitting down with somebody who is not interested in claiming benefit and they don’t want to find work, then it is very much a waste of time.’

(New Deal 50 Plus adviser)
Although customers would often be given an appointment, many would be disappointed to find that Jobcentre Plus was unable to help them:

‘We’ve had some people nearly reaching their 70th birthdays that were coming in......We were making an appointment for them...but we were tending to find that the people that were coming in were very dischuffed with us because all were doing was giving them a leaflet for pension credits or saying “sorry we can’t help you, this is not our role”.’

(New Deal 50 Plus adviser)

Some providers appeared unaware or insufficiently sensitive to the need of advisers to carefully manage appointment diaries. The perception among some Jobcentre Plus staff was that outreach workers lacked training and appropriate ‘product’ knowledge and expertise in relation to Jobcentre Plus:

‘I was assured by [the intermediary manager] that his staff were fully trained and they knew what provision to do by the book, yet we had all sorts of issues like [outreach staff] demanding [customer] interviews [with advisers] at times which weren’t appropriate.’

(DPQMT)

In one district a bespoke training day was hurriedly arranged for provider staff involved in the pilot, mid-way through the lifetime of the project, to foster better working relationships and address key gaps in knowledge and procedures. However, the issues were ongoing.

Provider staff were portrayed as having a poor understanding of Jobcentre Plus business, their strategies, working practices and procedures. In one district it was reported that 50 plus provider outreach staff were attending venues and speaking to customers where Jobcentre Plus staff already had a presence:

‘Some of [the provider’s] staff were not appropriate. They did not have a lot of Jobcentre Plus background, in respect of knowing what was available.’

(DPQMT)

‘Even to this day I don’t think [the intermediary] actually understands our business.’

(DPQMT)

At the heart of the difficulties were differences of opinion and practice regarding which 50 plus customers were eligible and appropriate for referral. Advisers felt providers should be more selective in referring only those 50 plus customers either interested in employment and/or eligible for Jobcentre Plus help, despite the pilot remit being broader than just job ready customers.

In these districts, both Jobcentre Plus and intermediary staff believed that, with hindsight, their pilot project would have benefited from better training,
communication and liaison between the parties and a clearer setting of objectives from the outset. Respondents felt that this would not only have fostered greater ownership of the pilot, but would have reduced the likelihood of inappropriate referrals:

‘...I think [it would have been better] possibly if there had been more liaison before the pilot started, to get a clearer picture.’

(DPQMT)

2.7 Timing

In many respects, the difficulties and tensions experienced by providers and Jobcentre Plus, particularly around the referral process, indicate that the pilot was adversely affected by poor timing. In the two years between the pilot’s conception and realisation, and during the two further years of its operation, Jobcentre Plus changed considerably in terms of its focus, structure and services. As a result, there was significant staff reorganisation and redeployment and, across all districts, budgets were reduced. Services and operations were re-focused on priority groups of benefit claimants. Jobcentre Plus offices merged and some smaller, local offices, were closed. There were also strong moves towards reducing footfall and ‘drop ins’ to jobcentres through promoting user driven and remote access services such as Job Points and telephone and internet based services:

‘Since this pilot has started Jobcentre Plus has gone through huge radical changes and our business that we run doesn’t really coincide with this pilot...That’s because we’re looking to reduce what we call footfall, people coming off the streets through our doors, and this is what the pilot is all about, to try and get people through those doors.’

(DPQMT)

‘It has all changed now. It would be more difficult for [those not on benefit] to access the system now. They would need to use the call centre or go on line.’

(New Deal 50 Plus adviser)

With the introduction and roll out of IB Pathways to work Pilots, people on Incapacity Benefit (IB) increasingly came within the mandatory regime of Work Focused Interviews (WFIs) and customer were obliged to attend Jobcentre Plus as a requirement of their benefits.

As time passed, competing priorities and pressures on advisers and the restrictions placed on their time by the need to achieve outcome targets, began to sit uneasily with the pilot:

‘Because jobcentres are very busy, time is precious...[Advisers] are driven by targets that they need to achieve...[With the Over 50s Pilot] there is nothing attached to it.’

(New Deal 50 plus adviser)
[The Over 50s Pilot] doesn’t really fit with the [Jobcentre Plus] business…This is what advisers have as their view. It’s like “I’ve got to achieve these targets already and yet this is taking up my time and I’m getting nothing out of it”…’

(DPQMT)

Adviser support and services were increasingly targeted on customers eligible for Jobcentre Plus programmes. Though not excluded from using services such as Job Points, in many districts, people over state pension age and those not in receipt of benefits were no longer entitled to help from a Jobcentre Plus adviser:

‘…because she was over 65 and …she didn’t figure in the stats, they couldn’t see her. She could use the jobcentre if she wanted to but she couldn’t get that extra help.’

(Outreach worker)

Little distinction was made between customers who were interested in work and those who were not:

‘Although we are a jobcentre that places people into work, we’re looking to place people into work who are claiming benefits, not people who are either employed already or self-sufficient on savings and they don’t need benefits to survive…because we don’t achieve anything out of those people…That is the way [the Jobcentre Plus] business has gone…we’re being selective.’

(DPQMT)

In these respects, a sharp contrast was evident in the help available to over 50s customers at the start and at the finish of the pilot:

‘I had somebody who was over 65 who had had to take mandatory retirement…and wanted to carry on working… I introduced her to the matching adviser …who would ring her up with jobs and this lady subsequently became a lollipop lady…A friend of hers a year down the line was .. retired in the same way…and the matching adviser couldn’t see her.’

(Outreach worker)

In this atmosphere of staffing cuts, belt tightening and increased targets, providers were sympathetic and understood why advisers might be less positive about the pilot:

‘The reorganisation of Jobcentre Plus unfortunately clouded the communication between what they thought the pilot was for [and] what it was about…It probably wasn’t the best medium to make people enthused about the pilot…if people were being made redundant.’

(Provider manager)

Nevertheless, these changes left them with a number of practical problems. Staff relocation and redundancies meant that providers would often lose their named
contacts in jobcentres. This made it difficult for outreach workers to make contact or book appointments with advisers. Customers would sometimes have to wait three weeks or more for an appointment, some losing interest in the interim:

‘With the rollout and the changes that have been going on in Jobcentre Plus the staff haven’t always been available or even in the office or they’ve actually moved offices…so when [the provider] has tried to ring the jobcentre to speak to an adviser, they have not been able to get hold of their people.’

(DPQMT)

The closure of some local offices during the pilot period, without providers being informed, was a source of annoyance and embarrassment:

‘In the area I was covering, they shut down two jobcentres during the year which caused me a great deal of hassle.’

(Outreach worker)

‘I was…talking to a group and halfway through the presentation this chap says “excuse me, just a minute, can I just say that the jobcentre [in my town] is closing down next week!”, and I didn’t know that. That was a bit embarrassing.’

(Outreach worker)

Not only did these changes cause practical problems for providers, in many respects they clouded the terms of reference under which the pilot had initially been conceived and ran counter to what providers had understood its main purpose to be:

‘The initial pilot was about contacting people who didn’t have any experience of Jobcentre Plus and referring them to Jobcentre Plus services but in this area, the majority of people that I’ve been working with actually do already have some involvement or have had some involvement with Jobcentre Plus.’

(Outreach worker)

Even in the district in which Jobcentre Plus and intermediary staff worked collaboratively, managers acknowledged that the practices of frontline staff ran counter to the objectives of the pilot:

‘We…had a period where we had casual staff in and I have heard one or two stories in that customers have walked in and the message they got was ‘62! Are you daft, what are you doing here?’

(DPQMT)

In some districts, working relationships deteriorated and providers ceased making referrals altogether. In others, providers began to deal with customers themselves, offering advice and guidance and making referrals to local employment support,
training and volunteering opportunities as appropriate. Across all districts, the number of referrals to Jobcentre Plus fell away significantly:

‘The pilot started off well but as it progressed it did tend to go pear shaped because of the changes taking place within…Jobcentre Plus…The people that we might have had as a main adviser had been moved on to somewhere else and there hadn’t been any handover...’

(Provider manager)

The message that most providers had been promoting of jobcentres as friendly, drop-in centres offering client-centred back to work services to people of all ages, backgrounds and benefit status, simply no longer held true. As they evolved, Jobcentre Plus delivery ran counter to the aims and objectives of the whole pilot exercise. Though better consultation and co-operation may have improved working relationships between the key players, it seems unlikely such liaison activity would have affected the outcomes of the pilot.

2.8 Summary: Best practice and lessons learned

• Pilot projects would have benefited from better communication and liaison between Jobcentre Plus and pilot providers from the outset.

• Pilot projects with greater degree of integration and involvement between providers and Jobcentre Plus generally fared better than those where relationships were more distant.

• The active involvement of Jobcentre Plus staff was a key success factor. In districts where this had been achieved, providers and Jobcentre Plus were clearly working towards a common goal, which led to good working relationships and quality customer service.

• Providers would have valued more opportunities to share experiences with one another and felt the pilot would have benefited from more networking opportunities.

• The timing of when future pilots are introduced needs to be considered carefully in relation to wider policy developments.
3 Pilot activities and methods

This chapter describes the various marketing methods, promotional events and activities organised and delivered by pilot providers and assesses their effectiveness in terms of engaging and encouraging Jobcentre Plus usage among members of the target group. It also examines the content and context of delivery and the extent to which these aspects of the pilot’s performance were instrumental in overcoming customers’ barriers and concerns.

3.1 Promotional and outreach activity

Most intermediaries began their marketing and outreach activities by producing and distributing leaflets and posters. Some delays were experienced in all areas during the early months of the pilot as a result of providers having to wait for Jobcentre Plus clearance on the marketing materials they produced. While most providers accepted this as being part of the pilot formation process, a small minority commented that these delays had taken up more time than they had anticipated:

‘We had to go to the Jobcentre Plus marketing department several times to rectify [our marketing material]. That went backwards and forwards half a dozen times until they were happy with it.’

(Provider manager)

There was much discussion about whether or not to use Jobcentre Plus logos on marketing materials, in addition to those of the pilot providers. Most providers compromised by using both:

‘The whole point of this is to raise our profile….anything they put out should obviously have our logo on it…because that was the whole point of the exercise.’

(DPQMT)

One district deliberately avoided using the Jobcentre Plus logo as it was felt that the project was set up to pilot different methods and materials in recognition that conventional marketing was not working.
The style and quality of materials were also hotly debated, with Jobcentre Plus marketing staff often reluctant and requiring much persuasion to approve leaflets and posters that, to them, appeared ‘sub-standard’:

‘…we had…to be very careful because Jobcentre Plus have certain standards that you must adhere to….that was a barrier we came across in that it did not meet our protocol.’

(DPQMT)

Leaflets and posters highlighted the help available to people over 50 including information and advice on jobs, training and volunteering. Some also offered advice on pensions, tax and benefits. Included were details of the organisation’s address and telephone or freephone number where people could contact a named outreach worker.

While discussion and differences of opinion centred on the use of logos and livery, no-one appeared to take issue with the messages conveyed on marketing materials. Contract management staff in some districts seemed happy to endorse materials which portrayed Jobcentre Plus as an agency offering a wide range of services to the over 50s, including information and advice on pensions, benefits and tax. This may have reflected different interpretations of the invitation to tender (ITT) documentation, although a close reading of the document reveals no mention of these wider services, only information and advice on jobs and volunteering.

Marketing materials were distributed using a variety of outreach methods, including door-to-door delivery in the form of a letter drop; placement in various community venues, such as libraries, doctors’ surgeries and community halls; or handed out in person using local venues such as supermarkets, shopping centres and bingo halls. Venues used to distribute much of the material were used by providers to bring them into face-to-face contact with potential customers, urging them to use Jobcentre Plus and publicising the range of services on offer. These approaches were largely indiscriminate with outreach staff approaching any individuals who looked to be over the age of 50.

In spite of using different livery and logos, the common experience among providers was that broad marketing and outreach was unsuccessful in attracting the target client group. Estimates from providers about the number of people made aware of Jobcentre Plus services ranged from 60,000 to 600. However, very few were thought to be interested in employment and the number of referrals to Jobcentre Plus resulting from these approaches was reported to be minimal. One provider distributed 37,000 leaflets during the course of the pilot, yet received only 64 responses, the majority from retired people wanting pensions advice. Another provider distributed 5,000 leaflets to various community venues, yet in total referred only 90 individuals to Jobcentre Plus, including those engaged via other methods.

Another provider came up against an unexpected barrier, when via a ‘school bag drop,’ it distributed promotional leaflets to local primary schoolchildren in the form
of an invitation to their grandparents. Although the invitation elicited some positive responses (see Case study B in Section 4.3.1), this approach had unforeseen consequences and the leaflet was hurriedly withdrawn after complaints were received from parents who objected to their children being targeted in this way. It was also considered to be inappropriate to distribute leaflets to children whose grandparents may have recently passed away.

In several pilot areas, the outcome was a disproportionate response by older people who were not interested in improving their employment prospects but who wanted pensions or benefits advice. That many were referred onto Jobcentre Plus was a source of frustration and resentment among busy advisers for whom such individuals fell outside their remit:

‘The majority of people referred through the pilot, the only thing they were interested in was benefit advice and pension credit advice. It was very rarely that they were looking at getting into employment.’

(New Deal 50 plus adviser)

‘There were people referred [to us] that were asking for help with their pensions, and obviously we can signpost to the pensions centre and the pensions service, but personally we haven’t got the advisers that can help them here. We also had referrals from outside the area and people that were on Jobseeker’s Allowance.’

(Adviser manager)

From the perspective of many advisers, inappropriate referrals included those interested in volunteering and those above the state pension age, categories of customers clearly within the scope of the original pilot:

‘There was a lot of inappropriate [referrals], especially in the early days…they were past the working age. We referred them back [to the intermediary] saying the customer wasn’t suitable.’

(New Deal 50 plus adviser)

Jobcentre Plus staff believed that providers had ‘oversold’ what Jobcentre Plus could offer, placing too much emphasis on volunteering, pension and benefits advice. Complaints from advisers in one district culminated in the reprinting of publicity materials, omitting references to pensions and benefits advice. Thereafter, the numbers of referrals fell away significantly:

‘Pensions [advice] was on the original leaflets. I think people were just homing in on that, ‘pensions’…That is why we got too many [referrals] and led to pensions being taken off the publicity material…That may be why the referrals to the jobcentre actually dropped off.’

(DPQMT)
Other providers found that several of the over 50s who responded to posters and other promotional materials did so with the expectation that they would be dealt with by the intermediary organisation. A number had had recent contact with an adviser, including Jobseeker’s Allowance (JSA) and Incapacity Benefit (IB) recipients, but had found that Jobcentre Plus was unable to help them.

Some respondents, including DPQMTs, felt the experiment in rebranding had been a worthwhile exercise in raising the profile of Jobcentre Plus:

“They have actually been more effective than the [Jobcentre Plus] branding because…they were more eye catching than our standard [adverts]…Our own Marketing Executive, although they were umming and aahing about them being unconventional, they were asking “can we get a supply of these as well?””

(DPQMT)

However, the majority were less sanguine. While leaflet drops and poster campaigns were regarded as a ‘cheap and cheerful’ method of awareness raising, overall, they were deemed to have been an ineffective and resource intensive method which, for the most part, failed to reach over 50 individuals in the target group:

“The leaflet drops …and outreach…involve a lot of man hours and we didn’t get the kind of return that we would expect…But to help raise awareness in communities then that is what we have been doing because with our budget we can’t always advertise in the newspapers.’

(Outreach worker)

“I would say it was an expensive PR exercise.’

(DPQMT)

3.2 Newspaper and magazine advertising

Some providers supplemented the distribution of leaflets and posters with newspaper advertising and magazine articles. Advertisements highlighted the help available to 50 plus individuals looking for advice and information on jobs, volunteering and, in some cases, pensions. Adverts were accompanied by a freephone number so that people could contact the intermediary.

Adverts were placed in a variety of sections within local or district newspapers and freesheets. Those that were placed in newspapers or posted in or near the ‘situations vacant’ sections of publications were deemed to have worked best because they targeted older people looking for jobs:

“One of the things that have been really interesting with this project…is that people have responded to adverts in the press…It feels like [for] the employment focused stuff, people are looking in newspapers and they are responding to that.”

(Outreach worker)
Adverts placed elsewhere were less effective, often tending to attract individuals who predominantly required information and advice on pensions and benefits, rather than work:

‘Some 50 plus customers just required benefit or pension advice... The adverts were misleading resulting in the above, you know, pensions advice.’

(New Deal 50 Plus adviser)

Some intermediaries experimented with using editorials and case studies within newspapers. These often included ‘real life’ examples of 50 plus individuals that had found work or training through using the outreach service and/or Jobcentre Plus assistance. While these were more expensive, providers felt they had been effective and produced more responses than newspaper adverts alone. Over 50s customers, it was thought, could identify with the individuals portrayed and the specific barriers they faced when seeking work, including ageism. Often the messages they conveyed were of the benefits of working:

‘We have put general [adverts] in newspapers... But we don’t get as much response [compared] to when we place them... with an editorial, to put an advert into context. We tend to get more telephone calls [that way]... so we use case studies.’

(Provider manager)

Interestingly, one of the most innovative and successful methods of engaging the over 50s and referring them to Jobcentre Plus, was never intended as a pilot activity, but rather as a mechanism for recruiting a team of 20 sessional outreach workers. Placing the advertisement in a local newspaper, potential candidates were required to attend Jobcentre Plus to collect their application form, where they had the opportunity to speak to a New Deal 50 Plus adviser. The advert generated an overwhelming response which resulted in 170 people accessing the jobcentre. Noting the huge response, Jobcentre Plus and provider staff commented on the evident demand for part-time, ‘interesting’ jobs and volunteering opportunities among the over 50s:

‘When the [paid] volunteers were advertised we placed an advert in the paper... That got over 170 people across the area into the job centre and engaged with a 50 plus adviser... specific to that [job] opportunity.’

(Provider manager)

Advertising in specialist magazines aimed at retired and older people, on the whole, proved unsuccessful, with providers reporting very little, if any, response. Some felt that this may have been due to the way in that the magazines were distributed. However, the fact that the readership of the magazines was primarily people who had retired from work seems a more likely reason:
'We tried a retired magazine which had limited success for a variety of reasons. First and foremost it’s a freebie... There isn’t a vested interest in [them] and they go to places like supermarkets... and it’s very much left to the store manager to where they put them... The response from [magazines] was only so, so.’

(Outreach staff)

3.3 Radio advertising

Three providers sought to market their outreach service using local and/or regional radio stations. These adverts usually took the form of a short dialogue or sketch which illustrated the kind of help and support individuals using the service might receive, together with a freephone number. Due to the relative expense associated with this form of advertising (up to £3,000 for a basic campaign) none of the providers had been able to afford any more than a single radio campaign over a short one to two week period:

‘The radio is a really good way of reaching people, but it is also very costly...’

(Outreach worker)

Some providers believed that this had been their most successful method of engaging the over 50s target group:

‘What was most successful, over the whole two years [of the pilot], was the radio advert campaign... That worked well because what you had was a big reach across the audience who were generally over 50... It meant that by having that wide spread we worked out there were 292,000 people (though these were not all over the age of 50) who heard [the advert] over two weeks.’

(Provider manager)

What appeared to be less successful was the number of referrals to Jobcentre Plus which resulted. One intermediary reported it had received 63 telephone calls following its radio advert. Of these, 31 were referred to Jobcentre Plus but only 16 were said to have met with a Jobcentre Plus adviser.

3.4 Bus advertising

Again, for reasons of cost, advertising on the side of buses was used less commonly and only one intermediary piloted this form of marketing. Adverts displayed similar information to that used on leaflets and were also accompanied by a freephone number. This method was regarded by the provider and by Jobcentre Plus to be of very limited effectiveness. None of the customers who responded to marketing and publicity were reported by the provider to have been engaged via this method:

‘We advertised on the side of buses... We thought that would be a good vehicle to go across the borough... [but] that didn’t produce any [responses].’

(Outreach worker)
3.5 Promotional events and activities

Some intermediaries had experimented with attracting the over 50s target group by running health advice clinics, social events, fitness and recreational activities. One provider offered free ‘electric blanket testing’, and another offered blood pressure testing. Though often highly successful in encouraging attendance from the over 50s, such methods were deemed to have worked far less effectively in terms of attracting and engaging those interested in work. In many respects the type of customer attracted to such events, reinforced by the messages they conveyed, was of older, retired and sometimes ill and infirm individuals. Many were well past retirement age in their late 60s and 70s, some even older. To the extent that any referrals to Jobcentre Plus resulted from such events, they would often be from individuals with pensions and benefits queries:

‘I think that [the intermediary] has gone to the wrong [places] like electric blanket testing events and a flu jab week…which conjures up images of the granny taking along an electric blanket, not an active 50 year old looking for employment…That resulted in us having pension credit queries and things that we cannot deal with.’

(DPQMT)

In a similar vein, other providers sought to entice individuals through offering incentives including free prize draws, free ‘giveaways’ such as pens, hats and umbrellas and running competitions and talent contests. Again, while free products and services proved popular with older people, there was little evidence to suggest any such events or offers of free help encouraged attendance at Jobcentre Plus by individuals who were interested in work, whether claiming inactive benefits or not.

3.6 One-to-one surgeries

Holding regular surgeries in venues such as libraries and community centres and working with people on a one-to-one basis developed into a popular form of outreach provision. These were set up in response to the greater perceived effectiveness of methods which promoted face-to-face contact in more neutral and relaxed settings

‘The surgeries that they held in libraries were very good…’

(DPQMT)

Venues used for outreach, whether for delivering workshops, surgeries or other events and activities, were considered by respondents to have played an important part in encouraging participation and engagement. In particular, using small community venues where people felt more relaxed and could receive a face-to-face service, was important in not only encouraging people to attend, but also in creating a more open interaction:
'I think what works with 50 plus customers is meeting them on their territory. I think that the pilot is clearly showing that.'

(DPQMT)

'If we can actually get to a one-to-one with a customer on neutral ground, then we can sell the service.'

(Provider manager)

Nevertheless, while 50 plus customers were often happy to engage with providers on an outreach basis, few were referred to Jobcentre Plus. Using their knowledge of local networks, outreach workers would often refer customers direct to volunteering or training opportunities, rather than referring them to Jobcentre Plus. People on inactive benefits were said to be concerned that attending Jobcentre Plus would be seen as an indication that they were fit for work:

‘The ones who were on Invalidity Benefit were very, very protective of their benefits, really, really scared that they may lose benefits.’

(Outreach worker)

Some outreach workers were reluctant to challenge such views and did not feel it was in their remit or role, or indeed their expertise, to be convincing people of the benefits of working.

3.7 Formal talks, presentations and group discussions

One provider focused its outreach activity on talks and presentations to groups and organisations which targeted the over 50s. Small discussion groups were deemed to work better than formal presentations, in so far as they facilitated discussion and encouraged greater interaction and openness:

‘The formal presentations were fine…but the small groups of five or ten people were better…You get a bit of interaction going and people are able to share with one another experiences of jobcentres…and so you are able to bounce things off one another and bring all the people into the conversation.’

(Outreach worker)

In spite of meeting customers face to face on their own terms and territory, outreach workers found it difficult to get their message across. The mere mention of Jobcentre Plus would often send people ‘running for the exits’. A greater reluctance to engage was noted particularly among men, with outreach workers concluding that many were in fear of losing their benefits:
‘Most of the men … were running out into the car park because they thought I was after their benefits…or I was going to be talking about the Employment Service…there’s suspicion of people who are going to be talking about…moving from being dependent on benefits into…paid employment… In some ways it was difficult and a wee bit disappointing.’

(Outreach worker)

3.8 Employment events and jobs fairs

Having struggled to engage individuals using conventional marketing and outreach methods, some intermediaries began organising themed events and jobs fairs targeted at older people. Present at these events were Age Positive employers; specialist training providers; volunteer providers and Jobcentre Plus including New Deal 50 plus advisers. Held in various accessible town and city centre venues, these events appear to have been much more successful in attracting over 50s people specifically interested in work or volunteering. The presence of employers was felt to be a key success factor.

A key strength of the events was the opportunity they afforded for outreach providers to meet 50 plus individuals in a relaxed and neutral environment. That the event took place outside of a Jobcentre Plus office was considered particularly pertinent, so too the fact that it facilitated face to face contact and personal service:

‘Large events have worked well… You can get face-to-face contact rather than just having to telephone people back all of the time.’

(Outreach worker)

‘[The] events have worked well… You’ve got everything you need under one roof and it creates a relaxed atmosphere...’

(Provider manager)

The fact that customers attending jobs fairs were more than happy to meet with 50 plus advisers suggests that it may be the specific context of Jobcentre Plus delivery, rather than the advisers themselves, that 50 plus customers can find off-putting:

‘It’s a fear factor…[an] ‘us and them’. Customers walking through official doors…are hearing horror stories that we stop people’s money, that we force people to do things…we treat them like they’re not worthy of being in our offices.’

(New Deal 50 plus adviser)

Taking advisers outside the Jobcentre Plus context may, therefore, help to weaken negative associations between Jobcentre Plus back-to-work services and its benefit policing role.
Having a number of specialist providers available in one location was considered equally important. Viewed as a particularly efficient and effective mechanism for delivering support, jobs fairs enabled customers to receive a more holistic and comprehensive service. Advice, information and queries could often be dealt with immediately, without the need for onward referral:

‘If you’ve got several organisations all under one roof then you can pool your resources for the benefit of that person…What we noticed with the events is that you talk to people and they say “I want to do volunteering”, you can then take them to the volunteering bureau and they engage there and then…Whereas if you are in the community you have to phone and make an appointment…If it is on the spot, then people are more likely to engage.’

(Provider manager)

‘People often want an answer there and then…They don’t want a second or third stage [referral].’

(DPQMT)

It was, however, the presence of a number of Age Positive employers, who were actively looking to recruit more mature workers, which was identified as the key factor in attracting the attendance of the over 50s, albeit those who were more job ready:

‘We were giving people the opportunity to engage with employers and to possibly move on into paid employment…We used [Age Positive] employers as a means of getting people to attend [the events]…which seemed to work really well.’

(Provider manager)

Having training providers present also encouraged attendance and individuals were reported to have been signing up for courses at the events:

‘We were giving people the opportunity to engage with employers and to possibly move on into paid employment…We used employers as a means of getting people in who can connect with the services, which seemed to work really well.’

(Provider manager)

‘The Learning Network brought ten laptop computers to one of our events and people just had a go…A lot signed up for the next course starting in their local community.’

(Provider manager)

To attract people to the events, providers placed newspaper adverts and leaflet drops inviting the over 50s who wanted to improve their employment prospects to attend. Used in this more targeted way, these methods were deemed to have
worked much more effectively than generic, unfocused advertising for outreach services:

‘General [adverts] in newspapers for outreach don’t get much response... but if we place them with an event... we... get more response.’

(Provider manager)

These events were reported by all parties to have been a clear success. One provider was so impressed with the results it made these events the cornerstone of its entire strategy, holding a series of regular quarterly events for the remaining lifetime of the pilot:

‘[The provider] held opportunities fairs... We treated it as a jobs fair which meant that we could get the performance out of it as well. We had a New Deal 50 Plus adviser on hand on the day, [training] providers, employers... most of whom had been sourced by [the provider]. [The events] were good... because we got something out of it... we got an opportunity to meet customers and the provider got an opportunity to engage people on a wider scale.’

(DPQMT)

Constrained by the pilot’s terms of reference, providers that had not piloted this form of customer engagement recognised the potential benefits of this more holistic, ‘one stop shop’ approach. Some perceived the requirement of the pilot to refer to Jobcentre Plus and the lack of direct employer liaison as key areas of weakness. A number felt that, had they run projects for longer, or were given the opportunity to do so again, then more focus would be placed on forging closer links with Age Positive employers:

‘The demand placed on the outreach worker to interface with the public... meant there has been limited opportunities for contact with employers... So actually interfacing with employers... [That] is an opportunity we feel that we’ve not addressed as fully as we might have done.’

(Provider manager)

While jobs fairs and events were cited among the more successful methods of engaging the over 50s, providers acknowledged that few of those attending appeared to be inactive benefit recipients. Most attendees were said to be people with professional, managerial or skilled technical backgrounds who had retired early, often due to ill-health. Many such customers were said to be keen to work but preferred to deal with employers direct, rather than be referred on.

3.9 Advice sessions and workshops

One provider changed tack part way through the pilot and began offering information and advice sessions to the over 50s on a group and one-to-one basis. They also ran a series of workshops designed to help the over 50s consider their options, improve motivation and built confidence, prior to a return to work. Another even began to case-load customers.
These initiatives were developed after a number of 50 plus individuals returned to the provider for further help following referral to Jobcentre Plus. Although interested in employment, many customers were far from job ready and required personalised, longer term or more intensive support than was available.

‘The quick fix, just referring them to Jobcentre Plus services, doesn’t work for everybody. I wouldn’t say for the majority really.’

(Outreach worker)

Some were at a distance from the labour market, having been out of work for a long time. Others had up to date skills and recent work experience but needed to change career, having been forced to leave their job due to ill health. Either way, they needed more support than a single meeting with a 50 plus adviser was able to provide:

‘Hand on heart I honestly don’t think that the Jobcentre Plus advisers have the time to deliver that person-centred sort of support.’

(Outreach worker)

‘We did an evaluation and it came out very clearly that people wanted to come back again, they wanted ongoing support, that one intervention isn’t enough.’

(Provider manager)

Customers with a health condition, for example, needed time to reflect and guidance to consider their options, particularly regarding retraining. Even individuals who were clear about the options available to them often needed personal help and support which Jobcentre Plus was unable to offer:

‘We are talking about people who often know what the options are, yet they need some sort of support and motivation to help them with those choices. So a simple referral [to Jobcentre Plus] is not enough... They want someone to engage with...’

(Provider manager)

In many respects, the remit of the original pilot broadened to include activities and services never intended or anticipated. The single intervention ‘sign-posting’ service to Jobcentre Plus was, thus, superseded in these areas by a multi-intervention model of advice and support which, in many cases, bypassed Jobcentre Plus entirely.

3.10 Meet and greet services

In two pilot areas, outreach workers acted as mentors, ‘meeting and greeting’ 50 plus customers outside the jobcentre and introducing them to a 50 plus adviser prior to a booked appointment. In one district, 50 plus advisers themselves met and escorted customers around the jobcentre, showing them how to use the Job Points and other jobcentre facilities.
'Meet and greet' services appeared to be effective in helping to overcoming the barriers of 50 plus customers with no previous history of claiming benefits and who had rarely, if ever, used Jobcentre Plus. Typically, such customers had worked most of their adult lives, often finding jobs in newspapers or by word of mouth. Few such customers had IT skills or PCs or felt confident about using internet-based services. For many, jobcentres were 'not for the likes of them', places for people who were young, unemployed or wanted to claim benefits. Born of a different era when jobs were plentiful, attending a jobcentre or seeking help in finding work carried a certain stigma. Simply stepping over the threshold was a significant barrier to be overcome.

Women, in particular, were said to respond well to meet and greet type services. Some felt too intimidated or uncomfortable to attend the jobcentre without an appointment. Just having a named contact to ask for at reception was felt to have given them enough confidence to attend Jobcentre Plus:

‘Older people value face-to-face communication and having a named contact…That is one of the messages we have had relayed back to us very strongly through this.’

(Provider manager)

3.11 Skills and attributes of outreach workers

Regardless of the method used, the role of outreach workers was considered to be crucial to any attempt to engage 50 plus customers. In particular, the ability of outreach workers to identify and empathise with older adults was considered to be key. Most pilot providers made conscious attempts to recruit outreach workers whose ages broadly matched those of customers being targeted. Ensuring outreach staff had similar characteristics to the customer target group was recognised by Jobcentre Plus, provider staff and customers, across all districts, to have been a key element of good practice which worked well in engaging older people:

‘The pilot…was a excellent idea, simply because it was older people talking to older people. Sometimes there is nothing more threatening than a [young person] telling somebody who is 50 what they should do, because…it is off putting.’

(Outreach worker)

‘[Having] older people talking to older people was a brilliant idea…You tend to listen [more] if somebody is your own age…’

(Customer)
‘Having [outreach] workers over 50… you could challenge people… [Customers] could say “what can I do I’m old, I’m over 50!” and the outreach worker can say “well so am I and I’m working. Nothing is stopping you from doing it!” I do think [the provider] used the right people… to deliver [outreach] for them.’

(DPQMT)

The fact that outreach workers were in some cases volunteers, or employed by providers independent from Jobcentre Plus, was believed to have helped engender trust among the target group. Outreach staff, unlike their Jobcentre Plus counterparts, are not compromised by having to perform a benefit policing role or the requirement to meet performance targets:

‘… they are more likely to come on board seeing that you’re just an ordinary real person and you are not somebody aloof sitting behind a desk creating a barrier… That sells it more positively.’

(DPQMT)

‘What people want [is] a friendly face…. somebody to take an interest in them… somebody to give them confidence and … somebody that they can trust.’

(Outreach worker)

That such workers were perceived to be independent and impartial was seen as particularly important.

A crucial addition to this set of attributes, but overlooked by most pilot providers, was the need to convince customers in receipt of inactive benefits that a return to work is economically viable. Few outreach workers had a good enough knowledge of the tax and benefits system to be confident of persuading people claiming inactive benefits that they may be financially better off in work. Others did not consider it their role to be challenging attitudes to work or convincing people of its value.

In the event, because so few people from the claimant target group responded to providers’ approaches, the feasibility or potential benefits of using an independent intermediary in this capacity was never realised. This suggests that customers may first need to be convinced of the benefits of working before they are willing to consider the offer of back to work help, regardless of who may be providing it.
3.12 Summary: Best practice and lessons learned

- Marketing methods that more successfully raised awareness and stimulated interest among the target group included newspaper advertisements and radio advertising.
- Marketing and outreach that targeted the over 50s interested in work was more effective than general advertising and outreach approaches.
- Themed events specifically aimed at people looking for work, training or volunteer opportunities and small group workshops and discussion groups were identified as the most effective outreach approaches.
- Information and advice delivered one to one basis, together with direct access to job vacancies produced the most effective customer engagement.
- Outreach methods which encouraged links with Age Positive employers worked well at engaging the more job ready.
- Meeting individuals over the age of 50 on their own territory and in neutral and accessible venues was highlighted as an important factor for engaging this group.
- Using older people as outreach workers worked well in helping to build trust and break down customer barriers.
- Outreach approaches based on face-to-face contact and which encouraged a more personalised service were deemed to have worked well in engaging the over 50s.
- Practical assistance, including ‘meet and greet’ services, mentoring and hand-holding services were much appreciated by customers over the age of 50.
4 Who responded and why

This chapter examines, in greater detail, which types of 50 plus customers responded to the pilot and why. Drawing on the interviews with Jobcentre Plus staff, pilot providers and customers, it describes the characteristics and backgrounds of pilot participants, explores the barriers they faced in terms of Jobcentre Plus usage and assesses the extent to which the approaches and methods piloted by providers were effective in helping them to overcome these barriers.

4.1 Profile of those responding

Providers who participated in the research were surprised by the sheer diversity of backgrounds and barriers which the individuals who responded to the pilot presented with. Significant variations were apparent in terms of their: ages, gender, educational backgrounds, work experience and benefit claiming history and nature and extent of prior involvement with Jobcentre Plus. Indeed, the only characteristic which appeared to define them collectively as a group was the fact that they were all over the age of 50:

‘[The over 50s] have varied backgrounds and varied histories…some have never worked and spent most of their lives on incapacity benefit, to others that have held high paid, high pressure jobs and are maybe looking for an outlet for their talents just to keep them occupied…It’s such a wide range of people…You can’t come up with a package that is going to be interesting to them all.’

(DPQMT)

These different personal histories and experiences not only appeared to shape quite significantly the degree to which individuals had been able to exercise choice and control over the manner and timing of their departure from work, but also influenced whether the decision to re-enter the labour force was being made out of necessity or choice. This heterogeneity also gave rise to a whole series of different
motivations for seeking employment, training or voluntary work which, in turn, affected their receptiveness and responsiveness to the approaches of pilot providers.

Relatively early on in the pilot, these layers of complexity posed serious challenges to pilot providers in terms of their marketing and outreach strategies. Though realising customers were extremely varied in terms of their backgrounds, barriers and motivations, most had designed a ‘one size fits all’ model and were at a loss as to how they should reach and engage such a wide ranging group of individuals:

‘It’s such a wide range of people… You can’t come up with a package that is going to be interesting to them all.’

(Provider manager)

Many simply continued as they had started, with marketing and outreach. In large part these strategies appear to have been ineffective in reaching the intended target group:

‘I don’t think this had reached the clients that it was intended to…. That is the main crux.’

(DPQMT)

Others, more particularly providers with experience and understanding of the over 50s, changed their approaches to facilitate a more personalised, tailored advice service:

‘Any idea you might have had that these people share the same sorts on interests and problems is not the case… There is no “one size fits all” [approach]… You have to tailor the advice and the help to an individual’s needs because they are such a varied group.’

(Provider manager)

4.2 People wanting pensions and benefits advice

Across all districts, the vast majority of people engaged by pilot activity fell outside its original remit. The largest group of respondents were over state pension age, in receipt of a state or occupational pension and predominantly wanted pensions or benefits information and advice. In some areas, it was not uncommon for advisers to be seeing people in their 70s and 80s:

‘The majority of people referred through the pilot, the only thing they were interested in was benefit advice and pension credit advice.’

(New Deal 50 Plus adviser)

These individuals appeared to have responded to the ‘overselling’ of Jobcentre Plus services by intermediaries through the advertising of pensions and benefits advice. The types of events some providers organised and the outreach venues they attended were also contributory factors:
‘I don’t think this [pilot] has reached the customers that it was intended to…[The intermediary] has gone to the wrong places like working men’s clubs and electric blanket testing week and a flu jab [centre]…’

(New Deal 50 Plus adviser)

4.3 People interested in employment

Customers genuinely interested in employment constituted a large and important group of those who responded to the approaches of providers. Individuals within this group appeared to vary greatly in terms of their gender, health, benefit claiming history and current status, past work experience and their current motivations and reasons for wanting to work. Some were above state pension age, some below; some were on benefits, the majority were not; some needed to work, many did not. In spite of these key differences, their age and benefit status often determined the way in which Jobcentre Plus dealt with them.

4.3.1 Those not in receipt of benefits

By all accounts, the vast majority of individuals seeking employment were not currently in receipt of any benefits. A significant proportion were above state pension age and in receipt of an occupational or state pension. Some had taken early retirement due to ill health or because they had good occupational pensions, while others had worked up until state pension age. People above state pension age were rarely looking for full-time work, most wanted a part-time job to ‘top-up’ their pensions and to keep themselves mentally and physically active. Females in particular were said to like the social contact work brings and some wanted to combine part-time work with caring for grandchildren or an elderly relative. In the majority of cases, returning to work was a matter of choice rather than financial necessity.

People in their 50s and 60s who had yet to reach state pension age made up another significant group of those engaged. Very few were in receipt of benefits. Individuals had typically been made redundant or forced into early retirement during their fifties or early 60s. For many, giving up work had been a relatively recent occurrence and most were hoping to rapidly make the transition to a new, less demanding job. While many were fit and healthy, others had illnesses or ailments which restricted the amount and type of work they could do. Health conditions varied widely, although the most commonly cited included heart disease, high blood pressure and respiratory problems. A health problem often meant a change of occupation or career and many needed training or work experience to allow them to move into a new area of work. Gaining employment for these individuals was more of a necessity than one of choice:

‘I worked for the same firm for 34 years, since leaving school…I finished there because the factory was closing…I needed employment [after that] because I couldn’t live off my [occupational] pension…’

(Male pilot customer)
‘People we work with are ones…who have taken redundancy or been made redundant…they realise financially it wasn’t good, they couldn’t exist on what they’d taken and needed to find something else.’

(Outreach worker)

In most cases, customers who were not on benefits had full working histories with little or no prior experience of claiming or of Jobcentre Plus. When wanting or needing work, many responded to newspaper advertisements or contacted friends and relatives, often finding work through word of mouth or personal recommendation. A common perception was that jobcentres were places for ‘layabouts’ and ‘scroungers’, and as such, stigma, personal pride and fear of the unknown, were key barriers preventing them from accessing jobcentre services:

‘I thought the jobcentre was for lazy, idle people…and [that] people [were there] sat behind desks who weren’t really interested in the public. That was my perception of it.’

(Pilot Customer)

‘We had a checklist to quantify some of the reasons people didn’t want to be referred…Personal pride was the top one…They see [going to the jobcentre] as degrading.’

(Provider Manager)

Often customers held negative preconceptions without having ever used the service. Those who had, had done so for only limited periods, typically in the 1980s or early 90s. Views were thus based on outdated images of the jobcentre. Such experiences presented key barriers against using the service again:

‘The last time I was out of work [during the 1980s]…the jobcentre was a pretty dire place to be honest…It was really grim…a terrible place to go.’

(Pilot customer)

‘I didn’t want to go [to the jobcentre] because of my last experience in the 80s.’

(Pilot customer)

Many such individuals, who had recently been referred to the jobcentre by the intermediary, had been pleasantly surprised at their experience this time around. Case study A provides one such example. Positive comments were particularly evident in districts where the pilot approach had been focused on giving participants a more personalised service from the 50 plus advisers:

‘The [New Deal] 50 plus adviser would [aim] to establish a rapport that would put that person at ease, given that fear is the biggest barrier…They would [show them] the job points and give them a reccy of what the jobcentre is like…So they did get preferential treatment the first time they walked in.’

(New Deal 50 plus adviser)
Case study A: 56 year old male

This customer had worked in the engineering industry for the majority of his career. He had only experienced two periods of unemployment, once for two and a half years during the 1980s and the second time during 2005. The customer had been made redundant on both occasions.

Based entirely on his experience of using jobcentres during the 1980s, this customer held quite negative views of the service:

‘The last time I was out of work [in the 1980s]…the jobcentre was a pretty dire place to be honest…It was really grim.’

Having made contact with the intermediary during 2005 this customer was persuaded to use the jobcentre services once again. The intermediary appeared to have placed great emphasis on the fact that jobcentres had changed dramatically and now offered a more personalised and friendly service. Upon attending the jobcentre, the customer found this to be a true reflection of service he received:

‘I was pleasantly surprised with the way I was treated [at the jobcentre]…They made me feel like a customer, asking “would you like a seat?” “how are you feeling?”, “can we help you?”, that kind of thing…’

As a result of his referral this customer signed on for Jobseeker’s Allowance (JSA) and eventually secured employment through the jobcentre’s assistance.

Nevertheless, in other districts, the fact that customers were either above state pension age or not in receipt of benefits, meant that, in many cases, Jobcentre Plus could not help them. Some customers responding to marketing and outreach, arrived at the jobcentre only to receive an impersonal and, as they saw it, less than welcoming service. Without an appointment or a named contact, and ‘confronted’ by security staff at the door, some pilot customers felt quite intimidated by the experience. Case study B gives one such example.
Case study B: 66 year old female

Until her retirement at the age of 60 the customer had always worked in a variety of full and part-time jobs. She had never used or needed to use jobcentres. Jobs, she claimed, were ‘easy enough to come by’ usually by word-of-mouth. To her, jobcentres were not places for older people, but there ‘for the younger ones’.

Since retiring she had helped to care for her grandchildren, allowing her daughter to return to full-time work. As her grandchildren were now older and took up less of her time she became bored. She decided she would return to work on a part-time basis to keep herself mentally and socially active but took no practical steps:

‘I needed to do something with my time…I get really bored. …I didn’t want a full time job…and be tied…Just something to give me some interest, just to take me out of the house and give me something to do.’

At this time she received an invitation given to her granddaughter in school, highlighting that Jobcentre Plus could help the over 50s to enter employment. She called person on the leaflet who booked an appointment for her with a Jobcentre Plus adviser. Having a named contact gave her the confidence to telephone.

Attending the jobcentre on the allotted day, she was informed that the adviser was not available and simply told to use the Job Points or Jobseekers Direct. No one offered to help. She felt intimidated by the ‘computers’ and left. A week later she returned, accompanied by her daughter who showed her how to use the Job Points and telephones, a service she felt the jobcentre should have provided:

‘I had never worked a computer and I didn’t know what to do, but my daughter took me down…I hadn’t a clue…[but my daughter] showed me what to do.’

With the help of her daughter, the customer secured part-time work as a carer via Jobseekers Direct. Her experience at the jobcentre confirmed her original fears and reinforced her perception that jobcentres were predominantly geared towards helping younger people:

‘It just hit me while I was [at the jobcentre] with all the young ones around me…I just felt out of place.’

In other cases, regardless of whether or not they were interested in work, customers over state pension age were referred back to the intermediary or simply told that Jobcentre Plus could not help them. In these instances, the pilot may have done more harm than good, reinforcing negative perceptions of Jobcentre Plus rather than overcoming them:
‘[For] the people who have had very limited experience of Jobcentre Plus…who have had a lifetime of employment…are not used to the jobcentre system and find it really intimidating…People talk about the bouncers on the doors, even though there are meant to be meters and greeters helping people. That isn’t the image people have.’

(Outreach worker)

‘You can walk through the [jobcentre] door and have these huge security guards on the door asking ‘what are you here for?’…[Customers] are not having that friendly enquiry that you would expect from the jobcentre.’

(Outreach worker)

Some respondents who attended Jobcentre Plus offices had more positive experiences, particularly those who were only interested in jobsearch and did not need the help of an adviser. One respondent who managed to secure part-time employment after attending the jobcentre and using the Job Points, was full of praise regarding the service he had received:

‘I was pleasantly surprised with the way I was treated [at the jobcentre]…They made me feel like a customer…and I got…a job…They were very helpful.’

(Pilot customer)

Nevertheless, some individuals from more professional or skilled technical backgrounds bemoaned the lack of suitable employment opportunities at the jobcentres and preferred more direct methods of contacting employers. Services that facilitated direct employer links and which did not require attendance at a jobcentre, therefore proved to be more popular (see Case studies C and D). The fact that events were specifically targeted at the over 50s appeared also to work well in engaging people:

‘[The event] was advertised for the over 50s…so I thought it would be useful to go…’

(Pilot customer)

‘The sorts of jobs that are available, the basic job offer at jobcentres isn’t as wide as their aspirations and forgets the skills that they’ve got.’

(Provider manager)

‘My advice to the jobcentre…get a wider range of jobs and consider how they can be matched, because we’re not talking about over 50s that are feckless or who have never worked and don’t want to work…[They] are people who have had a career or have a lot of skills…and want to use them.’

(Outreach staff)
Case study C: 67 year old female

This customer spent the majority of her career working as a teacher, taking early retirement then working in various part time and full-time jobs. During the latter stages of her working life she had short periods of claiming JSA. Her recollection of using the jobcentre at this time was predominantly negative:

‘I found it disheartening, almost to the point of being demeaning…There [were] so many young people with no work, nothing for them to do. They were so disheartening, just hanging around. I felt awful to be part of that.’

Although she had now been in receipt of her pension for some years, she occasionally undertook short periods of paid employment to help pay for holidays or for work on the house:

‘It was the roof that prompted [me working]. I keep spending money on the house and there is nothing going back in…I said to the builder “I am going to have to back to work” and he laughed at me…I went and worked in a call centre.’

During her latest period of needing to secure work, she recalled seeing a newspaper advertisement and editorial, produced by the pilot provider. This drew attention to Age Positive employers that were looking to recruit individuals over the age of 50. She contacted the intermediary who sent her information about vacancies that were currently available, passing on the contact numbers of Age Positive employers. The customer subsequently secured employment with one such employer.

Case study D: 56 year old male

This male customer had been made redundant in 2002 following the closure of the steel works company he worked for. Although he had worked in the same manufacturing plant for 38 years and had been contributing towards his pension throughout this period, he came away with no pension due to the company going bankrupt:

‘To pay [my pension] for 38 years and to come out with nothing, it’s a kick in the teeth……It would have been worth roughly about two hundred pounds a week, about ten thousand pounds a year by now. That would have done me easy…’

Having become unemployed the customer and his colleagues were able to claim JSA for nine months. After this period he was told that he would need ‘to go to the social’ to make a fresh claim. However, as he had some savings, the customer presumed that he would not be eligible for any benefits and did not pursue the claim.

Continued
Case study D (continued)

Although actively searching for work the customer had struggled to secure employment and felt his age was now a key barrier:

‘[The employer] didn’t want me, whether it was because of my age...That is one factor...my age.’

As such, having a pilot event which promoted job opportunities specifically for the over 50s was a major draw for the customer. He had heard about it by word-of-mouth and was looking to secure employment with an Age Positive employer. Although he did not secure employment this time, he felt that having such an event for the over 50s was worthwhile. Not having younger people present was a key draw for him:

‘[The event] was advertised for the over 50s...I was over 50 [so] I thought I’d have a go...because you can go to these places and there are loads and loads of youngsters there...’

4.3.2 Those in receipt of inactive benefits

Although an important target group for the pilot, people on inactive benefits were by far the smallest group to respond to the approaches of providers. Concerns that enquiring about work would result in the loss of benefits was highlighted as a key barrier preventing these individuals from engaging with Jobcentre Plus. This was reported as being a particular worry amongst those who had been claiming inactive benefits for longer periods:

‘Those that have been on benefits a long time...They’re the people we’re meant to be working with, they’re the hard to reach and they’re hard to reach because they are hard to reach! The majority of people I’ve worked with in the life of this project don’t fall into that category.’

(Outreach worker)

‘There’s an awful lot of fear about what’s going to happen to people, to their benefits...Whether it’s justified or not, people are very fearful of that.’

(Outreach worker)

Another related barrier amongst individuals was the belief that work did not pay. Given the lack of contact with Jobcentre Plus, few were thought to know about permitted work, benefit protection and other financial incentives introduced to encourage a return to employment among people on inactive benefits.

Nevertheless, a small minority of individuals claiming inactive benefits did respond to provider approaches. One group comprised new or very recent claimants of incapacity benefit. Individuals had typically been employed for most of their working lives but been forced to end their careers due to ill health. They were now looking to
re-enter employment, albeit at reduced hours and in a less demanding environment than their previous jobs. Their main requirement was for careers advice, retraining or work experience to enable them to change career or occupation. In many cases, 50 plus advisers were unable to help and some were referred back to the provider for further help.

In contrast to longer term claimants of inactive benefits, the reservations and barriers in relation to using the jobcentre, tended to be focused around issues of stigma. In these respects, their barriers were similar to people in receipt of occupational pensions. Any concerns they did have centred on preconceptions of the types of clientele that frequented jobcentres and their own personal pride. As such, services which focused on allaying these fears and which offered a more ‘hand-holding’ type service appeared to have worked particularly well at engaging this group. Intermediaries who were perceived as a ‘trusted organisations’ and as specialists in the over 50s field seemed to have fared better than others at attracting individuals from this group.

Customers who were job ready and needed little in the way of training or support fared best. Case study E illustrates such an example.

**Case study E: 64 year old male**

After working for over 40 years in the building trade this customer was forced to take early retirement after suffering a serious heart attack. He began claiming IB but soon became bored and decided to return to work. His health condition prevented a return to his previous job or to full-time employment, but he thought part-time work would be suitable, giving him more free time, together with some additional income:

‘I had no intention going back [to work] 40, 50 or 60 hours a week…I wanted less hours to spend more time with my wife and enjoy life…I wanted something to occupy my mind more than anything…part-time work, plus a bit of spending money.’

He was unsure of the implications of working on his IB but reluctant to use the jobcentre because of his perception of the types of people who used them:

‘I thought the jobcentre was just for lazy idle people taking the mickey out of the state…’

After seeing a newspaper advertisement offering employment advice to the over 50s, the customer decided instead to contact the pilot provider:

‘[The advert] mentioned if you had been ill or had been off work for a period of time there was help to get back in…It sounded just right.’

Continued
Case study E (continued)

In a telephone call to the provider, the customer was reassured that the jobcentre would be able to help. An appointment was booked for him and an outreach worker met him outside the jobcentre to introduce him to his adviser on the day of his meeting, a service that he found ‘very helpful’. A better off calculation (BOC) was found to be particularly useful in helping him decide it was worthwhile to work 15 hours a week. The customer attended four meetings with a 50 plus adviser before securing part-time employment.

This experience completely changed his attitude towards the Jobcentre Plus and he found the entire process, from dealing with the provider to attending the jobcentre, to have been extremely positive:

‘The people at the jobcentre were very, very helpful…If anybody was in the same situation that I was 12 months ago…and had the same feelings about the jobcentre I would tell them different…I would say “go down and see them” because they are there to help you.’

For others, there were some concerns that Jobcentre Plus was unable to offer the longer-term support or training opportunities that some of these individuals required:

‘The experience during my life on this project is that actual retraining opportunities delivered directly by Jobcentre Plus has probably diminished.’

(Provider manager)

‘We got [the customer] fixed up with a horticulture course, but it was cancelled due to lack of funding and this is a real problem we’re having…that people get that far, it takes a long time to get them to the place where they’re saying ‘I want to do something’ and then funding is withdrawn.’

(Outreach worker)

Even some customers who were referred to a Disability Employment Adviser (DEA) had been unable to progress:

‘One chap who was a roofer and had a heart attack and he couldn’t go back to roofing…I referred him… to the DEA…but he’s still in the same situation…He’s come back to me saying “I haven’t moved on!”…He’s wanting some additional help.’

(Outreach worker)

The second group of inactive benefit recipients included individuals on Income Support (IS) or Carer’s Allowance. In some cases, customers were already working the maximum number of hours allowed, but found it difficult to progress into full-time employment. Often these individuals found themselves in a ‘benefit trap’. Some had already had prior contact with Jobcentre Plus but had found them unable to help. Turning to the intermediary for assistance was often a last resort for these individuals who desperately needed help to move beyond their current predicament. Carers in particular, found it especially difficult to progress, as Case study F shows.
Case study F: 52 year old female

The customer had been claiming Carer’s Allowance supplemented by IS for 20 years. A lone parent, she cared for her adult disabled son. For the last five years she had worked ten hours a week as a book-keeper, the maximum allowed without affecting her benefits.

Four years ago the customer self-referred to Jobcentre Plus to explore the possibility of undertaking a specific training course that would enable her to progress into full-time book-keeping. She approached the jobcentre for assistance only to be told that she did not qualify for help because although she was a lone parent carer, her son was 16 and was no longer classed as a child. The experience soured the customer’s view of the jobcentre:

‘At the jobcentre, they… would fund single parents but the child had to be under 14…I didn’t fit the criteria, so I couldn’t do [the course]… I don’t find that the jobcentre have got anything to do with carers at all [only] …people on Incapacity Benefit.’

Eighteen months ago the customer saw an advert in a newspaper offering help and advice for the over 50s looking for work. She responded and had a home visit from an outreach worker for which she was extremely grateful. She received six visits to discuss her options and explore the courses she might do to gain the qualification she needed. The intermediary organisation offered her voluntary work but this was not challenging enough. Finally referred to Jobcentre Plus for a BOC, it showed she would only be marginally better off by returning to full-time work. After 12 months in employment when the 50 plus element of her Working Tax Credit ceased, she would be financially worse off.

The whole process only served to confirm to the customer that she was in a benefit trap. Her view was that, despite the rhetoric, the jobcentre was doing little to provide the practical help and financial assistance many carers need to enable them to work.

4.3.3 Those in receipt of active benefits

Although individuals in receipt of active benefits were not a key priority group for the pilot, as most would already be in regular contact with the jobcentre, it was reported by advisers and pilot providers that some people in receipt of JSA had responded to the marketing and outreach activity. In other cases, pilot providers were taking referrals of 50 plus customers from Jobcentre Plus advisers whom they had not been able to help.
Case study G: 57 year old male formerly in receipt of Carer’s Allowance, sickness benefit and JSA

Having worked continuously in the printing industry for almost 30 years, during his mid 40s, the customer’s mother became ill. He gave up work to become her full-time carer, claiming Carer’s Allowance for nine years until she died. Depressed and with a serious dependency on alcohol, he claimed sickness benefit for a further year. During this ten-year period, the customer had very little contact with the jobcentre.

After one year on sickness benefit, the customer moved onto JSA and began seriously to look for work. After six months on JSA, he was provided with an adviser. Though desperate to return to employment, he claimed that she was little help and, he customer had found the jobcentre to have been of limited usefulness.

‘I had somebody called a personal adviser…but she was worse than useless…she was so negative…She just didn’t point me at any work, I got nothing from her…. There were all sorts of things that I wanted, like to go on a PSV course, get a licence to drive buses…I wanted to do that and she said “it’s out of the question”…so the dole were of no help at all.’

After two years of unemployment the customer saw a poster offering one to one help to the over 50s interested in employment. He knew and trusted the provider as a ‘caring’ organisation and had no hesitation in contacting them:

‘I had a lot of respect for [the provider] because I had help from them with my mother when I was taking care of her.’

He met once with the intermediary outreach worker. She knew he was eligible for New Deal 50 plus and referred him to the local Employment Zone (EZ). The EZ provided him with a list of available agency work and shortly after he secured a temporary job paying the minimum wage. Referred back to Jobcentre Plus to fast track his 50 plus employment credits, he was clear that without this financial help he would not have accepted the offer of employment. Through his own efforts and contacts he eventually secured permanent full-time employment. Overall, he found the experience of using the intermediary and attending the EZ to have been more productive than Jobcentre Plus:

‘The [EZ] were more positive. I was actually in work in two or three weeks after I contacted [them]…Not good work, but work, so it must have proved something that I got into employment so quickly after having contacted them.’
4.4 People interested in volunteering

The pilot was always set up with the intention of assisting people who were interested in voluntary work. From Jobcentre Plus’ perspective, voluntary work was to be seen as a form of work experience and a stepping stone into paid employment. In the event, most of the over 50s who responded were interested in volunteering for social and altruistic reasons:

‘Some of them were just looking for a little bit of training or a little bit of voluntary work, just to get them back out there. For some of them, it was the social aspect.’

(New Deal 50 plus adviser)

‘I think a lot of them are at a loose end and really wanted to do something, maybe not full-time or even part-time employment, but part-time training or part-time voluntary work.’

(New Deal 50 plus adviser)

Some individuals who engaged with the pilot wanted to pursue voluntary work as a means of gaining future employment. This group contained a mixture of both males and females and tended to be at the younger end of this age group (i.e. those in their early to mid 50s). Most were not on inactive benefits, though some were. They had found themselves in a position where they could not return to their previous employment, but the lack of savings and pensions meant that they needed to work.

Intermediaries reported that some of these individuals wanted to use voluntary work as a means of gradually building their confidence before re-entering paid employment. This was particularly evident amongst individuals who had left their previous employment due to a stress related or mental health condition, for instance. Such individuals often required additional support and assistance to help them moving back into work:

‘[Some of] the people I work with certainly aren’t ready to go back into work…A lot of the conversation [with them] is around…paid employment as an eventual aim [and] the steps they can take to access that…maybe volunteering…or activities like a walking group…if somebody has been agoraphobic.’

(Outreach worker)

‘I had one lady who was a teacher and left due to stress and she was very unsure about what she could cope with. She really did want to carry on working with children, but she also wanted to try out working with older people…She did voluntary work in one of our day care centres…and she went on a course…She’s now working.’

(Outreach worker)
Intermediaries who had helped these individuals to secure voluntary positions, rather than refer them to Jobcentre Plus, reported having a number successes. In other districts, where intermediaries had ‘blanket referred’ older people to Jobcentre Plus, many were told they could not be helped.

4.5 Summary: Best practice and lessons learned

• The over 50s present a highly diverse group, varying greatly in terms of their ages, educational backgrounds, work experience, benefit claiming history and the nature and extent of their prior involvement with Jobcentre Plus.

• Most pilot respondents required general pensions or benefit information and advice.

• Among the large and important group of pilot respondents who were interested in employment, a significant proportion were above state pension age and in receipt of an occupational or state pension.

• People above state pension age were rarely looking for full-time work, most wanted a part-time job to ‘top-up’ their pensions and to keep themselves mentally and physically active.

• Most customers not on benefits had full working histories and had little or no prior experience of claiming benefits or of using jobcentres. Stigma, personal pride and a fear of the unknown were key barriers preventing them from accessing Jobcentre Plus services.

• A more personalised, face-to-face and friendly service was highlighted as being important for engaging these individuals.

• Recent experience of using Jobcentre Plus services had helped many over 50s customers to overcome the outdated image and perceptions of jobcentres they often held.

• People on inactive benefits were the smallest group of pilot respondents, particularly those in receipt of benefits long term. Concerns that enquiring about work would result in a loss of benefits were highlighted as a key barrier.

• This suggests that people on inactive benefits may first need convincing of the financial benefits of working before they are willing to consider the offer of back-to-work help.

• More recent claimants of inactive benefits were more likely to respond to the pilot. Their main requirement was for careers advice, retraining or work experience to enable them to change career or occupation.
- Intermediaries perceived as ‘trusted organisations’ and specialists in the over 50s field seemed to have fared better than others at attracting individuals on inactive benefits.

- Intermediaries offering direct links to volunteering opportunities reported having some success. Though individuals at or above state pension age were mostly interested in volunteering for social and altruistic reasons, those below state pension age often perceived voluntary work as a means of gaining valuable experience in terms of possible future employment.
5 Key findings and conclusions

5.1 An overview of the Over 50s Outreach Pilot

The primary objective of the Over 50s Outreach Pilot was to raise awareness and encourage the use of Jobcentre Plus services among the over 50s. The main target groups were economically inactive individuals and people in receipt of inactive benefits who had no contact with Jobcentre Plus. However, the scope of the pilot was to include any individuals who were interested in paid or voluntary employment and would benefit from Jobcentre Plus services, regardless of whether or not they were in receipt of benefits or above state pension age.

Pilot projects were contracted out to independent intermediary organisations which delivered marketing and outreach strategies designed to encourage Jobcentre Plus usage. The thinking was that, through contracting out services in this way, the barriers to trust and negative perceptions of Jobcentre Plus that are known to deter older people would be removed, encouraging greater engagement and rapport.

5.2 Good practice

When it came to managing and implementing the pilot the degree to which Jobcentre Plus district teams engaged with the pilot across the five case study districts, varied significantly, from active hands-on involvement in the management and delivery of the pilot, through to a hands-off strictly contract management role. These differing degrees of involvement impacted on the design, conduct and success of the pilot. Pilot projects with greater degrees of integration and involvement between the providers and Jobcentre Plus generally fared better than those where relationships were more distant.

A key lesson learned in relation to setting up and managing such pilots is that clear objectives are required from the outset between Jobcentre Plus and the contracted provider. In relation to this pilot, this meant having clear objectives defined from the
outset in relation to which individuals needed to be targeted and referred to Jobcentre Plus. In some districts there was a lack of clarity and coordination between pilot providers and Jobcentre Plus staff in relation to who should be referred to Jobcentre Plus offices, resulting in confusion and worse still, tensions between Jobcentre Plus and provider staff.

Therefore, gaining the active involvement of Jobcentre Plus, including integrating Jobcentre Plus advisers as part of the pilot, was a key success factor. In districts where this had been achieved, providers and Jobcentre Plus were clearly working towards a common goal, which led to good working relationships and a better quality customer service.

A key constraint for the Over 50s Outreach Pilot was its implementation coinciding with key structural and policy changes within Jobcentre Plus, some of which ran contrary to the main aims and objectives of the pilot. Therefore, the timing of when future pilots are introduced needs to be considered carefully in relation to wider policy developments.

Some marketing and outreach methods were clearly more successful than others. Generally speaking, the more targeted the marketing and the more personalised and tailored the outreach service to the specific needs of individual customers, the more effective it was.

Marketing methods that more successfully raised awareness and stimulated interest among the over 50s appeared to be newspaper advertisements and radio advertising. Themed events acting as ‘one stop shops’, specifically aimed at people looking for work, training or volunteer opportunities, were identified as one of the most effective outreach methods. Other popular outreach methods included discussion groups and small group workshops in community venues.

Overall, outreach methods that offered information and advice on a one-to-one basis, together with direct access to jobs, training and volunteering opportunities, produced the most effective customer engagement. Individuals were perceived to respond better when services and events were targeted at the over 50s and where there was a strong presence of Age Positive employers, for example.

Using older people as outreach workers worked well in helping to build trust and break down customer barriers – outreach workers who were more mature adults themselves were generally better able, and perceived to be able, to identify and empathise with older adults.

Outreach approaches which encouraged a more personalised service, based on face-to-face contact, were deemed to have worked most effectively at engaging this group. Moreover, practical assistance at Jobcentre Plus offices and outreach venues, including ‘meet and greet’ services, mentoring and ‘hand-holding’ services were much appreciated by customers over the age of 50.
5.3 Lessons learned and policy implications

Overall, irrespective of the methods used, the experience of all pilot projects, was that the number of individuals in the target group who responded and were referred to Jobcentre Plus was lower than anticipated. Of all the different categories of the over 50s, those in receipt of inactive benefits appeared least likely to respond to the marketing and outreach approaches of providers. Among the small minority that did, many were not job ready or needed more intensive help and support than Jobcentre Plus could offer.

People over state pension age and those not in receipt of benefits responded in the greatest numbers. Many wanted pensions, benefits or volunteering advice but had no interest in work. Providers overselling what Jobcentre Plus did or could realistically do appeared to be a key reason, together with a possible flawed understanding as to what the pilot was about. Some providers were referring any and all 50 plus individuals, irrespective of whether or not they might be interested in work. Not unsurprisingly, this caused tensions and poor working relationships between Jobcentre Plus and some of the contracted providers.

At the heart of the difficulties were differences of opinion and practice regarding which 50 plus customers were eligible and appropriate for referral. Regardless of their interest in work, many Jobcentre Plus advisers were unwilling to help anyone who was not eligible for Jobcentre Plus provision. This was never the intention of the pilot but reflected the timing of its implementation. In the four-year period between the announcement of the pilots and their conclusion, Jobcentre Plus offices had centralised, staff had reorganised and services were refocused around priority groups of benefit customers. Most advisers simply had no time to spend with people over state pension age or not in receipt of benefit.

With hindsight, placing the pilot with 50 plus advisers may have been a mistake. Their clear focus and expertise is in helping job ready customers on benefits move into work. Nevertheless, even if DEAs had been involved, their focus too is on benefit recipients.

What the pilot did clearly evidence was a demand for employment, training and voluntary opportunities among the over 50s not on benefits.13 Many such customers had taken early retirement or been forced to leave a job due to ill-health but were keen to find alternative work. With little or no previous contact with Jobcentre Plus, many were receptive to the approaches of pilot providers. On the face of it, those with recent work experience, a solid employment history and transferable skills may appear better placed to help themselves, requiring little input or involvement from

\[^{13}\text{A recent DWP welfare reform paper outlined plans to pilot face-to-face guidance sessions to people approaching 50 or over 50, to deliver tailored and relevant information on working, training and planning for retirement (January 2006), p.71.}\]
Jobcentre Plus. However, many needed quality information and advice on training and jobs as part of a change of career. Jobs fairs were particularly important in helping the job ready but, for individuals needing to retrain, there appeared to be less support.

Given the extremely low response among the primary target group, there was little evidence to support the view that contracting out the marketing and awareness raising functions of Jobcentre Plus to independent intermediary organisations was any more successful in securing the engagement of 50 plus customers on inactive benefits than Jobcentre Plus. This strongly suggests that, while using an intermediary organisation can help to break down the barriers and misconceptions of people with a limited history of claiming benefits, it appears to make little difference to inactive benefit claimants.

Given their general absence from the pilot and therefore, from the research, the reasons for their lack of responsiveness of inactive benefit recipients must be inferred from the views of advisers and providers and previous research. We know already that the interface between Jobcentre Plus and this particular client group is likely to present specific and quite unique challenges. Although Jobcentre Plus may be the biggest provider of employment advice and information in the UK, this facet of the service is often subsumed by its benefit ‘policing’ role. It would appear then that these two roles may be incompatible as far as benefit recipients are concerned. The fear of losing benefits and the security that benefits bring may simply be too great. The key to the successful awareness raising among over 50s customers on inactive benefits may therefore be, not so much the setting, nor necessarily the perceived independence of the delivery organisation, but the ability to first convey the message that work pays.

The fundamental requirement of any awareness raising which seeks to persuade older adults in receipt of inactive benefits to engage with Jobcentre Plus, would therefore appear to be that it should address the key concern that a return to work is economically viable. No amount of awareness raising or outreach may be effective in convincing such customers to take up the offer of Jobcentre Plus back-to-work help without the prior knowledge and reassurance that they will not be worse off in work. In this respect, what may have been more useful to pilot would have been a targeted marketing or advertising campaign which sought to get this message across.

Another approach may have been for providers to have offered BOCs and information and advice on permitted work, benefit protection and other financial incentives designed to help in the transition from benefits to work. It is only through having access to this type of information that people will understand that they might be better off in work, or that they can try work without an effect on their benefits if their job is not sustainable.
On the other hand, in so far as Jobcentre Plus is unable to distance itself from its benefit policing role, the only effective means of encouraging target customers to access Jobcentre Plus back to work services, may be through a mandatory Work Focused Interview (WFI) which includes a BOC. What is interesting from the perspective of the Over 50s Outreach Pilot, is that with the introduction of mandatory WFIs and roll out of the IB Pathways to work Pilots, this lesson appears to have already been learned.
Appendix A
Methods and analysis

Insite’s methods for delivering the study and meeting the research objectives are outlined below:

A.1 Selection of pilot areas

The seven Jobcentre Plus Districts where the Over 50s Outreach Pilot was operating were as follows:

- Cardiff and Vale;
- Newcastle and North Tyneside;
- Wigan;
- Liverpool;
- Dudley and Sandwell;
- Lanarkshire;
- Fife.

Five of the seven pilot areas were selected for the study. This number ensured geographic coverage across Welsh, Scottish and English regions and enabled the inclusion of all three intermediary body types (public, private and voluntary sector). Pilot areas were also selected on the basis of known innovation in pilot design or delivery, or apparent good practice.
A.2 Design of research instruments

In-depth qualitative topic guides were developed for use with the different stakeholders. Five separate topic guides (see Appendix C) were prepared for use with:

- Jobcentre Plus pilot managers and staff;
- Intermediary body managers and staff;
- Over 50s Outreach Pilot customers.

The form of questionnaire instruments included both open questions and more closed questions. This allowed for some analysis of identified themes and issues while also permitting space for respondents to ‘open up’ and to pursue lines of thought important to themselves but which may not have figured highly in the topic guide or the preconceptions of the researcher.

A.3 In-depth, face-to-face interviews with Jobcentre Plus and intermediary organisation staff

In-depth, face-to-face interviews were held with two Jobcentre Plus staff and two external intermediary organisation staff in each selected pilot area.

A strong emphasis was placed on sourcing primary, qualitative information designed to bring in-depth understanding to the design, content, implementation, effectiveness and outcomes of the pilots in the different areas. These interviews provided an opportunity to consider specific successes and to identify good practice. Difficulties and less successful aspects of the pilots were also covered in order to explore lessons learned. In addition, the interviews provided an opportunity for researchers to gather relevant background material and any pilot performance data which may have been available.

Insite deployed senior staff and experienced researchers to carry out interviewing in specific Jobcentre Plus locations. Interviews took between one and two hours to complete and were tape recorded and transcribed for analysis.

A.4 In-depth, face-to-face interviews with pilot customers

Individual face-to-face interviews were held with a minimum of two and up to three customers in each of the selected pilot areas. Interviews lasted approximately 45 minutes and took place in customers’ homes. Interviews were tape recorded and transcribed for analysis.

The aims of the interviews were to identify customer views, experiences and outcomes of participating in the Over 50s Outreach pilot including the factors influencing the take up of back-to-work help, volunteering and employment
opportunities. This process also included finding out which elements of the pilot did and did not meet their needs and why, and what could have been done to improve services and outcomes.

Customers were sampled purposively and identified using data supplied to Insite by intermediary organisations. Only those signing a consent form stating they were happy to be contacted for the purpose of research were approached.

Potential interviewees were contacted by Insite via an opt-out letter (see Appendix B) asking if they would be interested in contributing to the research. A sample of those agreeing to take part was then contacted by telephone to arrange a suitable date and time for interview.

A.5 Transcription

All interviews were tape recorded and coded interviews were transcribed verbatim by experienced audio typists. Once completed, transcriptions were made available to the relevant researcher for their interpretation, analysis and write-up.

A.6 First level analysis – analysis pro formas

Using the transcripts, researchers conducted a preliminary analysis using a structured analysis proforma, reporting emerging themes, issues and good practice, as appropriate.

Senior Insite staff took responsibility for framing the analysis and ensuring adequate coverage across issues and themes. Researchers were responsible for analysing and writing up findings for each interview they carried out.

A.7 Secondary analysis – team workshop and pilot write-ups

Following the completion of analysis pro forma’s a secondary process of analysis took place via a team workshop. This ensured the benefits of everyone’s experiences from interviewing and analysis were fed back and made available to the team, as well as ensuring that the analytic approaches undertaken by Insite were consistent with the full range generated by the fieldwork.

Following the workshop, researchers contributed to the composite analysis and the identification of key issues through completing short descriptive case study write-ups for each pilot area they took responsibility for.
A.8 Composite analysis

The final stage of analytical work were carried out by the Project Manager and an Insite Partner. This involved bringing together previous information, analyses and write-ups to perform a composite analysis. The aim was to produce detailed, descriptive and analytical outputs. Issues and themes became the primary means of organising and marshalling material for presentation and report writing, in conjunction with the systems, processes, mechanisms and outcomes of delivery.
Appendix B
Opt out letter and form

Dear

Research into the Jobcentre Plus Over 50s Outreach pilot

We are asking for your help.

The Department for Work and Pensions (DWP) wants to improve the service and advice provided to people over the age of 50. They have asked us to carry out some research.

Your name has been selected randomly from XXXXXXXXXXXXXXXX’s records as someone who they informed about the services Jobcentre Plus can offer to people over the age of 50 and as someone they referred to Jobcentre Plus for advice and information.

The DWP has asked Insite to conduct a survey with a small number of people that have accessed this service. The purpose of this survey is to see what you thought of the service you received, whether it met your needs, and how it could be improved.

Insite is an organisation completely independent of government and political parties. Everything you tell us will be treated in complete confidence. No personal views or information will be passed on in a way that identifies individuals.

What happens now?

One of the researchers from Insite may contact you by telephone to arrange an interview during the next two weeks:

- An appointment will be arranged at a time that suits you
- An interviewer from Insite will come to your home
- We will thank you with a £20 CASH GIFT for your time
You many not hear from us. Please do not be concerned if you are not contacted as we’ve written to more people than we need to interview. If you don’t hear from us it will simply be because we have carried out enough interviews to give us the information that we need.

Participation in this survey is voluntary, and if you would prefer us not to contact you, please tick the relevant box on the enclosed form and return it within the next 7 days. If you would like further information about this research please do not hesitate to contact either XXXX XXXXXXXX (from the DWP) on XXXX XXXXXXXXX or XXXXXXX XXXXX (from Insite) on XXXX XXXXXXXX.

Whatever you decide, any benefits you may be currently receiving will not be affected in any way either now or in the future.

Yours sincerely,

Research Manager, Insite Research and Consulting

Jobcentre Plus Over 50s Outreach Pilot survey opt out form

NAME:

ADDRESS:

I do not want to take part in the research

If you do not wish to take part in the survey please return this form as soon as possible in the stamped addressed envelope provided
Appendix C
Topic guides

C.1 Over 50s Outreach Pilot topic guide: face-to-face interview with customers

Objectives:

1. To investigate the different approaches and type of support provided to 50 plus individuals
2. To examine how effective different types of help were in terms of encouraging 50 plus individuals to use Jobcentre Plus services and move closer to work
3. To record the outcomes and impacts of the pilot and to identify any best practice
4. To increase our understanding of what works for 50 plus customers

Personal details

I WOULD LIKE TO START BY ASKING YOU SOME BACKGROUND QUESTIONS ABOUT YOURSELF AND YOUR WORK HISTORY

1. Can you tell me how old you are?
2. Are you married/cohabiting? If so, is your partner working/retired (or semi-retired)?
3. Do you have any dependants?
4. Do you have any caring responsibilities? If so, for whom and how much of your time does this take?
5. Do you have any health problems or disabilities?
6. Do you have any qualifications? Have you received any recent skills training?

7. Can you briefly describe your employment history?
   – types of jobs
   – length of time in the jobs
   – when did you last work?
   – reason(s) for leaving most recent job (i.e. retirement, health reasons, redundancy, etc)

8. Are you currently in work or out of work?

**If the customer is working...**
   – what job are you doing currently?
   – how many hours a week do you work?
   – do you receive any in-work benefits? (e.g. 50+ credit, WFTC, CTC)
   – how long have you held this position?
   – how did you secure this job?
   – prior to getting this job, how long had you been out of work for?
   – what were the reasons for you being out of work?
   – what circumstances led you to going back to work?
   – did you have any concerns going back to work?
   – are you happy in your current job?
   – do you plan to stay?
   – are you better off in work than you were on benefits?

**If the customer is not working...**
   – how long is it since you last worked?
   – what benefits are you on (e.g. IS, IB, Pension Credit, etc)?
   – is there anything in particular which stops you from working or which makes it difficult for you to work or find work at present?
   – what concerns would you have if you went back to work?
   – would you prefer to be working if circumstances were different?
   – what would make a difference?
   – what type of work would you like to be doing?
   – would you prefer full, part-time hours or another flexible working arrangement or voluntary work – why?
9. What periods of unemployment and claiming benefits have you had in the past?
   - explore their benefit history
   - length of time on benefits
   - types of benefits claimed

**Past experiences and views of Jobcentre Plus**

*I WOULD NOW LIKE TO ASK YOU SOME QUESTIONS IN RELATION TO ANY INVOLVEMENT YOU MAY HAVE HAD IN THE PAST WITH JOBCENTRE PLUS PRIOR TO YOUR CONTACT WITH [NAME OF PROVIDER] AND REFERRAL TO JOBCENTRE PLUS*

10. **Prior to you involvement** in [the over 50’s outreach pilot], what was your opinion of Jobcentre Plus services and the help they provide?
    - why did you hold these views?

11. To what extent have you used Jobcentre Plus services in the past?

12. What sorts of things have you used the jobcentre for in the past and how helpful have you found them?
    - signing on
    - jobsearch
    - mandatory programmes
    - voluntary programmes
    - help and support from an adviser
    - back to work advice
    - other

13. Have you ever had any reservations about using the jobcentre or asking for help?
    - if so, what were they? (e.g. staff, environment, other customers, location, etc)

14. Have you ever asked for help but found they were unable to assist you?
    - if so, what were the circumstances?

15. **Prior to your involvement** in [the over 50’s outreach pilot], when was the last time you visited a jobcentre?
    - what was the visit for?
    - what happened?
    - how were they able to help you?
Experiences and views of the outreach provider

_I NOW WANT TO ASK YOU SOME QUESTIONS IN RELATION TO YOUR INVOLVEMENT WITH [NAME OF PROVIDER] WHO REFERRED YOU TO THE JOBCENTRE PLUS OFFICE_

16. How did you hear about or find out about the [intermediary organisation / over 50’s pilot]?
   – word of mouth
   – via marketing activity e.g. a newspaper/newsletter advertisement, radio advertisement
   – outreach event / activity
   – prior knowledge of /involvement with the intermediary organisation
   – other

17. Prior to your involvement in [the over 50’s outreach pilot], did you know or had you heard of [the intermediary organisation]?
   – if so, how did they know about them?
   – had they used their services in the past? what services? what had been their experience?

18. What in particular drew your attention to or persuaded you to access [the over 50’s outreach pilot]?

19. What were you interested in doing?
   – going back to work
   – finding out about back to work or in-work benefits
   – education or training courses
   – starting a business
   – volunteering
   – other

20. At the time you heard about [the over 50’s outreach pilot], were you thinking about going back to work or looking for a job (paid or voluntary)?
   – if so, had they taken any steps towards working?
   – in what way did they believe/hope [the intermediary/ pilot] would help them?
   – if not, what persuaded them to avail themselves of back to work help?
21. After finding out about [the pilot] what happened next?
   – who did they speak to / meet
   – where did they meet?
   – what sorts of things did they discuss?
22. What type of information and help did you want?
23. What type of information and help did you get?
24. From whom did you receive the help?
25. How many times did you have contact with the [name of intermediary organisation]?
   – over what period of time?
   – are they still in contact?
   – when was the last time they had any contact?
26. Did having contact with [name of provider] affect the way you viewed the Jobcentre Plus office? If so, in what way(s)?
27. What was the eventual outcome of your contact with the [name of outreach provider]?
   – referral to Jobcentre Plus office?
   – referral to a job vacancy – what happened?
   – referral to an education / training course? – what happened?
   – referral to another type of provision – e.g. ATJ (Action Team for Jobs), EZ help, self employment
   – referral to another provider
   – referral to a voluntary opportunity
   – jobsearch
   – further enquiries about working, volunteering, training etc.
   – other
28. Would you have taken these steps anyway without the help received from the [intermediary organisation]?
29. Overall what is your view of the help and service you received from the [intermediary organisation]?
30. Did you find the information and help received useful?
   – if so, how?
   – if not, why not?
31. Which aspects of the help you received did you find most useful?

32. What in particular did you like about the help you received from [the outreach provider]?

**Experiences and views of Jobcentre Plus**

*I NOW WANT TO FOCUS ON THE REASONS WHY YOU DECIDED TO ATTEND A JOBCENTRE PLUS OFFICE AFTER HAVING CONTACT WITH [NAME OF OUTREACH PROVIDER] AND WHAT YOU THOUGHT ABOUT JOBCENTRE PLUS*

33. After having contact/receiving information from [name of outreach provider] did you attend a Jobcentre Plus office and/or meet a Jobcentre Plus adviser?

   if yes
   
   – what were the circumstances?
   
   – If they met a Jobcentre Plus adviser, where did they meet?
   
   – If they visited a Jobcentre Plus office, why did they decide to visit the Jobcentre Plus office?
   
   – was there any particular information or help that persuaded them attend the jobcentre?
   
   – did they attend alone?
   
   – when did they visit?
   
   – how many times?
   
   – did they access any Jobcentre Plus services? if so, which?
   
   – did they meet an adviser? If so, what did they discuss?
   
   – did they arrange and/or have they been for any subsequent meetings? If so, explore the nature and content of these meetings.
   
   – did they get the help they wanted?
   
   – would they have attended the Jobcentre Plus office without the [the intermediary organisation’s] recommendation/referral/support?
   
   – **If no, why not?**

34. **If the customer attended a Jobcentre Plus office**, how did you find the experience of going to the jobcentre?

   – was it better or worse than they expected?
   
   – was there anything they particularly liked or disliked?
   
   – how did it compare to previous visits?
   
   – had the office changed in any way?
35. Do you think you would have gone to the jobcentre and/or spoke to a Jobcentre Plus adviser had it not been for [the intermediary organisation]?
   – if no, what was it that persuaded you to speak to the Jobcentre Plus adviser and/or go to the Jobcentre Plus office?
   – how important was the [intermediary organisation]?

36. Prior to your contact with [the intermediary organisation / over 50’s pilot], were you aware of the range of services and help Jobcentre Plus could offer?

37. Was there any information you gleaned that surprised you or particularly caught your attention?
   – if so, what?
   – why did they find it interesting?

38. What was the eventual outcome of your contact with the Jobcentre Plus office and/or meeting with the Jobcentre Plus adviser?
   – referral to a job vacancy – what happened?
   – referral to an education / training course? – what happened?
   – referral to another type of provision – e.g. ATJ, EZ help, self employment
   – referral to another provider
   – referral to a voluntary opportunity
   – jobsearch
   – further enquiries about working, volunteering, training etc.
   – other

39. Would you have taken these steps anyway without the help received from Jobcentre Plus?

40. Overall what is your view of the help and service you received from Jobcentre Plus and/or the Jobcentre Plus adviser?

41. Did you find the information and help received useful?
   – if so, how?
   – if not, why not?

42. Which aspects of the help you received did you find most useful?

43. What in particular did you like about the help you received from Jobcentre Plus and/or the Jobcentre Plus adviser?

44. How did the assistance you got compare with previous help you may have had from Jobcentre Plus?
Summary

FINALLY I WOULD LIKE TO ASK YOU SOME QUESTIONS ON HOW YOU FOUND THE SERVICE YOU RECEIVED FROM BOTH THE [NAME OF INTERMEDIARY ORGANISATION] AND JOBCENTRE PLUS

45. Was there anything [name of intermediary organisation] and/or Jobcentre Plus could not help with?
   – if yes, what and why did they not get the help they wanted?

46. What additional help would they like to see offered?

47. Do you have any suggestions for how these kinds of services could be improved for people in your circumstances? Why do you believe these improvements would be particularly useful?

48. Are there any other issues or points you would like to raise in relation to the service they received from the [intermediary organisation] and/or Jobcentre Plus that have not been covered?

Thank-you for your contribution
C.2 Over 50s Outreach Pilot topic guide: face-to-face interview with intermediary organisation pilot manager

### Objectives:

5. To investigate the different approaches and type of support provided to 50 plus individuals

6. To examine how effective different types of help were in terms of encouraging 50 plus individuals to use Jobcentre Plus services and move closer to work

7. To record the outcomes and impacts of the pilot and to identify any best practice

8. To increase our understanding of what works for 50 plus customers

### Details and background of intermediary organisation

_I would like to start by asking you some background questions on your organisation and your past involvement with the over 50s as a customer group_

1. Can you give me a background to your organisation………?
   - public, private, voluntary sector- what they do
   - when they were established /started operating
   - scale and geographic spread
   - number of staff employed
   - any prior experience of dealing with the target group?
   - any prior experience of delivering advice / training / employment programmes?
   - any experience of operating similar programmes to the over 50’s pilot? If so what?
   - any prior dealings with Jobcentre Plus or Jobcentre Plus customer groups prior to their involvement with the pilot?

2. To what extent was your organisation known in the local community prior to the running of the pilot?

3. To what extent was your organisation known among the target 50 plus customer group prior to the running of the pilot?

4. To what extent was the organisation involved in local/ national networks and partnerships (relevant to the 50 plus target group) prior to the running of the pilot?
Pilot design and implementation

I WOULD NOW LIKE TO ASK YOU SOME QUESTIONS IN RELATION TO HOW YOUR OVER 50s OUTREACH PILOT WAS DESIGNED AND IMPLEMENTED

5. How and when did your organisation first get to hear about the over 50’s outreach pilot?

6. Why did your organisation decide to bid?
   – did the aim of the pilot reflect their existing aims/activities?
   – spare capacity?
   – previous experience of running similar programmes?
   – desire to grow, diversify or generate income?

7. How was the pilot designed?
   – where did the information / ideas come from?
   – what sorts of issues were they seeking to address?
   – was any consultation carried out? e.g. with the target customer group?
   – who was involved in the bid / who wrote it?

8. When was your organisation selected to become a provider and when did it begin operating the pilot?

9. Is the pilot still operating?
   – if yes, when will it end?
   – if no, when did it finish? did it end prematurely? If so, why?

10. Can you provide an overview of the key design features of the Over 50s Outreach Pilot (as written in the bid)
   – content of main activities / methods to be undertaken
   – number and location of customers to be targeted
   – delivery arrangements – including staff, type, number and location of venues, extent of involvement of other organisations
   – geographical coverage of the pilot - urban, rural or a mixture of both

11. Can you describe how the pilot was implemented in practice?
   – was the pilot as designed / conceived different in any way to that implemented? if so, in what ways ? why was it different ?
   – if changes were made, was this in order to achieve/develop any specific elements of identified good practice? If so, what were these?
– how many staff were involved in the pilot?
  - what were their roles and responsibilities?
  - what skills and experience did they have?
  - what were the reasons for recruiting these individuals?
  - were staff specifically recruited or redeployed to work on the pilot?
  - what training did these staff members receive
– were all elements of the pilot delivered in-house?
– were any elements sub-contracted/outsourced to other organisation(s)?
  - if so what elements of the pilot and why?
  - to which organisation(s)?

12. How long did it take for your pilot to build momentum?
  – how long did staff recruitment take? Any issues?
  – when were you able to start marketing the service? Any issues?
  – how did you find the process in relation to the clearance of marketing materials with Jobcentre Plus (i.e. was it easy/efficient/difficult/time consuming)
  – when were the first customer referrals made? Any issues?

13. Did any (unforeseen) factors affect the implementation or running of the pilot?
  – if yes, what were they and what impact did they have?

14. How was the pilot managed?
  – was there a pilot steering group or did existing management arrangements apply?
  – who was involved?
  – what was the remit of the group and how often did it meet?
  – how well did the management arrangements work?

15. Did you have the opportunity to make any contact with other pilot providers? If so, what was the nature and frequency of this contact?
  – any sharing of good practice between providers (what was this)?
  
  If not, would you have liked the opportunity to have contact with the other providers? If so, why? If not, why not?
16. How was the pilot monitored and reported on?
   – were the contract and reporting requirements easily met?
   – were there any issues?

17. How were individual 50 plus customers monitored and tracked?
   – how were details of individuals taken and recorded?
   – were there any issues?

18. Did you maintain contact with customers after referring them? If so, how and what was the nature of this contact?

19. Was any (local) evaluation of the pilot undertaken?
   – if yes, what form did it take?
   – what did it find?
   – are any reports available?
   – can we have copies?

**Relationships with external organisations**

20. What kind of relationships and amount of contact has there been with Jobcentre Plus in relation to the running of the pilot?
   – which staff did they have contact with?
   – what was the nature and extent/regularity of contact?
   – how effective were relationships?
   – any particular aspects that worked well/less well?
   – are there any issues / concerns?

21. What kind of relationship and amount of contact has there been with other organisations in the running of the pilot?
   – what was the nature and extent of contact?
   – how useful and important have these relationships been?

22. To what extent did the organisation become (more) involved in local/ national networks and partnerships as a result of the pilot?
   – which networks, with which organisations and for what purposes?
Pilot delivery

I WOULD NOW LIKE TO FOCUS ON HOW YOU DELIVERED YOUR OVER 50s OUTREACH PILOT

23. Was the pilot given a specific name, if so why?
   – was this considered to be important, if so why?
   – did this help to differentiate the service? from what?
   – did naming the pilot encourage people to access the service? how?

24. Can you describe the different approaches and methods used to make the over 50’s target group aware of the pilot and of the help available?
   – what did their marketing and communication strategy consist of?
   – literature, events, activities, use of outreach facilities / staff etc.
   – links with other intermediary organisations?
   – which organisations did they take referrals from?
   – what worked well and/or most successfully (and why)
   – what worked least successfully and/or less well (and why)?
   – any evidence of good practice?

25. What types of venues, locations and outreach facilities were used for raising awareness of the pilot among 50 plus people?
   – what were the reasons for using these outlets?
   – which organisations were based there?
   – which venues worked well (and why) and which worked less (and why)?
   – how important was venue in terms of being able to reach and attract 50 plus customers?

26. Once customers showed an interest, what types of venues were used as locations for meeting and advising 50 plus people (face to face)?
   – what were the reasons for using these locations and venues?
   – which venues worked well (and why) and which worked less (and why)?
   – how important was venue in terms of being able to attract and engage 50 plus customers?
27. Were any specific attempts made to inform and engage people from ethnic minority groups?
   - if so, what methods were used and why?
   - which methods worked well and which less well?
   - any evidence of good practice?
   - if not, why not?

28. Can you describe a ‘typical’ process an individual might go through from initially finding out about the pilot to being referred/engaged, through to their referral to Jobcentre Plus or work.
   - how they found out
   - referral process
   - form of contact – where, with whom?
   - number of meetings
   - length of meetings
   - period of contact
   - type of help given
   - methods used
   - advice given
   - support offered
   - process of referral to Jobcentre Plus, voluntary organisation or employer

29. Throughout this process, how were 50 plus customers encouraged to use Jobcentre Plus services?

30. Can you describe the referral process to Jobcentre Plus?
   - was there a named contact?
   - was contact maintained with the customer? what was the nature of the contact and for how long?
   - did customers ever return to the intermediary organisation? if so, under what circumstances? was further help offered?
   - how well did referral work?
   - were there any issues around referral?
   - any examples of good practice?

31. What barriers and concerns do 50 plus customers have regarding the use of Jobcentre Plus services?
32. What types of help and support were on offer through the pilot in overcoming barriers and addressing the concerns of the over 50s?
   - which particular types of help / approaches or methods work best in overcoming these barriers/concerns and why?
   - what were the key success factors?
   - any examples of good practice?
   - which worked less well and why?

33. Which aspect(s) of the pilot were most important in terms of making a successful referral to Jobcentre Plus? e.g. period of contact, type of support offered, good relationships etc.

34. Are you aware whether customers’ perceptions of Jobcentre Plus had changed after being referred and visiting them? If so, in what ways? In not, why not?

35. In terms of delivering the pilot, where would you say has been the main focus of your efforts and why?

36. What attempts were made to encourage the over 50’s to take up voluntary work?
   - how successful were they?
   - what types of issues and concerns did the over 50’s have in relation to voluntary work?
   - to what extent was the pilot able to address these issues and concerns?
   - if no attempts were made, why not?

37. What happened after an individual was referred to a voluntary position?
   - was there any further contact or help?
   - If so, explore the nature of this contact.
   - any examples of good practice?

38. What attempts were made to encourage the over 50’s to move into paid work?
   - how successful were they?
   - what were people’s main issues and concerns in relation to returning to paid work?
   - to what extent was the pilot able to address these issues and concerns?
   - if no attempts were made, why not?
39. What happened after an individual was referred to a job?
   – was there any further contact or help?
   – If so, explore the nature of this contact.
   – any examples of good practice?
40. What attempts were made to encourage the over 50’s to take up training or education courses?
   – how successful were they?
   – what types of issues and concerns did the over 50’s have in relation to returning to education?
   – to what extent was the pilot able to address these issues and concerns?
   – if no attempts were made, why not?
41. Were any attempts made to refer customers on to other agencies/providers (other than Jobcentre Plus) e.g. Action Teams, Employment Zones, Careers Services or other support / programmes offered by the pilot provider.
   – if so, who were these agencies/providers
   – what attempts were made ?
   – how successful were they?
   – if not, why not?
42. Using some specific examples of individual customers (anonymised) who’ve accessed Jobcentre Plus services, begun volunteer work or moved into paid work, can you describe the process they went through and how their barriers were addressed?
   – what were the circumstances / reasons for this movement?
   – what accounted for the success?
   – were these customers mainly those with recent work histories/good qualifications/already highly motivated, etc?
   – would these individuals have accessed JC+ services/secured volunteer positions or jobs without their intervention?
   – what was the ‘added value’ of the outreach pilot?
   – which types of help worked best and why?
Pilot outcomes and impacts

43. How were the outcomes of the pilot (in terms of individual customers engaged and referred on) identified and recorded?
   – to what extent could individuals be tracked?
   – were there any issues?

44. Since the beginning of the pilot, how many 50 plus individuals were reached/engaged and over what period of time?
   – is this more or less than they expected (or the same)?
   – how do they account for it being more or less than expected?

45. How many 50 plus customers were referred to Jobcentre Plus?
   – is this more or less than they expected (or the same)?
   – how do they account for it being more or less than expected?
   – what proportion of 50 plus customers they engaged do these numbers represent?

46. How many/what proportion of customers who were referred to Jobcentre Plus actually attended?
   – what was the drop out rate?
   – is this more or less than expected?
   – how do you account for this?

47. How many and what proportion of 50 plus customers they engaged took up voluntary work?
   – is this more or less than expected (or the same)?
   – how do they account for it being more or less than expected?

47. How many and what proportion of 50 plus customers they engaged took up education or training?
   – is this more or less than expected (or the same)?
   – how do they account for it being more or less than expected?

48. How many and what proportion of 50 plus customers they engaged moved into paid work?
   – is this more or less than expected (or the same)?
   – how do they account for it being more or less than expected?

49. What other outcomes did customers achieve?

50. What other outcomes did the pilot achieve?
51. What has been the overall impact of the pilot in your area/district?
   − on individual 50 plus customers?
   − on the 50 plus customer group as a whole?
   − on them as an organisation?
   − on their relationship with Jobcentre Plus?
   − on their relationships with other organisations?

52. Have there been any additional (unexpected) outcomes or impacts of the pilot?
   − If so, what have they been and how and why did they come about?

**Pilot effectiveness, strengths and weaknesses**

_FINALLY I WOULD LIKE TO EXPLORE WITH YOU WHAT YOU FOUND TO BE THE KEY STRENGTHS AND WEAKNESSES OF THE PILOT AND WHAT ELEMENTS OF GOOD PRACTICE CAN BE DRAWN FOR LEARNING HOW BEST TO ENGAGE AND WORK WITH THE OVER 50s CUSTOMER GROUP IN THE FUTURE_

53. Overall, what has worked well and what has worked less well in terms of meeting the overall aims and objectives of the pilot?

54. What has the pilot contributed to what we know about what works (or doesn’t work) for the 50 plus customer group and why?

55. Was the pilot able to address customers’ needs and overcome barriers?
   − if so, how?
   − if not, why not?

56. In your opinion, would the individuals who were helped have otherwise accessed Jobcentre Plus services and/or moved into voluntary/paid work had it not been for the pilot?

57. What have been the particular strengths of the pilot?

58. What would you say has been its key success factor(s)?

59. What have been its main weaknesses or problems? (what has not worked as well as expected).

60. Which aspect(s) of the pilot were most important in terms of the achievement of its key aims and objectives?
   − skills of staff?
   − venues?
   − delivery organisation?
   − type or amount of help?
   − other?
61. Given the opportunity to run the pilot again, what would you do differently and why?

62. What elements of the pilot would you maintain or like to develop further and why?

63. What good practice has emerged from the pilot?

64. Has any good practice been used in other ways or transferred to other programmes your organisation runs?

65. What have been the key lessons learned from your organisation’s involvement with in the pilot?

66. Are there any other issues or points you would like to raise in relation to the pilot that have not been covered?

**Ask the pilot manager whether they can provide copies of the following:**

- any local evaluations of the Over 50s Outreach Pilot
- examples of any marketing material used for the pilot
- any press releases/newsletter articles about the pilot

Thank you very much for your contribution
C.3 Over 50s Outreach Pilot topic guide: face to face interview with intermediary organisation outreach staff

Objectives:
1. To investigate the different approaches and type of support provided to 50 plus individuals
2. To examine how effective different types of help were in terms of encouraging 50 plus individuals to use Jobcentre Plus services and move closer to work
3. To record the outcomes and impacts of the pilot and to identify any best practice
4. To increase our understanding of what works for 50 plus customers

Outreach worker background
I WOULD LIKE TO BEGIN BY ASKING YOU SOME BRIEF BACKGROUND DETAILS ON YOUR MAIN ROLES AND RESPONSIBILITIES IN RELATION TO THE OVER 50s OUTREACH PILOT

1. How long have you worked for [name of outreach provider]? Were you recruited specifically to work on the Over 50s Outreach Pilot? If not, what other projects/programmes are you involved with?
2. What are your main roles and responsibilities in relation to the Over 50s Outreach Pilot?
3. Are any other staff at [name of outreach provider] involved with the over 50s outreach provider? If so, briefly explore the main roles and responsibilities of these other staff members.

Pilot design and delivery
I WOULD NOW LIKE TO FOCUS ON THE METHODS AND ACTIVITIES YOU USED TO PROVIDE INFORMATION AND RAISE PEOPLE’S AWARENESS.

4. Can you describe the different approaches and methods used to make the over 50’s target group aware of the pilot and of the help available?
   - what did their marketing and communication strategy consist of?
   - literature, events, activities, use of outreach facilities / staff etc.
   - links with other intermediary organisations?
   - which organisations did they take referrals from?
   - what worked well (and why)
   - what worked less well (and why)?
   - any evidence of good practice and what in particular did this achieve?
5. What types of venues, locations and outreach facilities were used for raising awareness of the pilot among 50 plus people?
   – what were the reasons for using these outlets?
   – which organisations were based there?
   – which venues worked well (and why) and which worked less (and why)?
   – how important was venue in terms of being able to reach and attract 50 plus customers?

6. How long did it take for your pilot to build momentum?
   – when were you able to start marketing the service? Any issues?
   – how did you find the process in relation to the clearance of marketing materials with Jobcentre Plus (i.e. was it easy/efficient/difficult/time consuming)
   – when were the first customer referrals made? Any issues?

7. How did you go about engaging people who responded to the awareness raising and communication? What type(s) of approach seemed to work well? What worked less well?

8. Once customers showed an interest and were engaged, what types of venues were used as locations for meeting and advising 50 plus people (face to face)?
   – what were the reasons for using these locations and venues?
   – which venues worked well (and why) and which worked less (and why)?
   – how important was venue in terms of being able to attract and engage 50 plus customers?

9. Were any specific attempts made to inform and engage people from ethnic minority groups?
   – if so, what methods were used and why?
   – which methods worked well and which less well?
   – any evidence of good practice?
   – if not, why not?
10. Can you describe a ‘typical’ process an individual might go through from initially finding out about the pilot to being referred/engaged, through to their referral to Jobcentre Plus or work.
   - how they found out
   - referral process
   - form of contact – where, with whom?
   - number of meetings
   - length of meetings
   - period of contact
   - type of help given
   - methods used
   - advice given
   - support offered
   - process of referral to Jobcentre Plus, voluntary organisation or employer
   - any ongoing contact between outreach provider and the customer after referral

11. Throughout this process, how were 50 plus customers encouraged to use Jobcentre Plus services?

12. Can you describe the referral process to Jobcentre Plus?
   - was there a named contact?
   - was contact maintained with the customer? what was the nature of the contact and for how long?
   - did customers ever return to the intermediary organisation? if so, under what circumstances? was further help offered?
   - how well did referral work?
   - were there any issues around referral?
   - any examples of good practice?

13. What barriers and concerns do 50 plus customers have regarding the use of Jobcentre Plus services?

14. What types of help and support was on offer through the pilot in overcoming these barriers and addressing the concerns of the over 50s?
   - which particular types of help / approaches or methods work best and why?
   - were there any methods/approaches that worked less well in practice and why?
   - what were the key success factors?
   - any examples of good practice?
15. Which aspect(s) of the pilot were most important in terms of making a successful referral to Jobcentre Plus? e.g. period of contact, type of support offered, good relationships etc.

16. Why were some people willing to visit/be referred to Jobcentre Plus and others not?

17. Are you aware of any changes to customers’ perceptions of Jobcentre Plus after being referred? If so, how had their perceptions changed? If not, why not?

18. What attempts were made to encourage the over 50’s to take up voluntary work?
   – how successful were they?
   – what types of issues and concerns did the over 50’s have in relation to voluntary work?
   – to what extent was the pilot able to address these issues and concerns?
   – if no attempts were made, why not?

19. What happened after an individual was referred to a voluntary position?
   – was there any further contact or help?
   – If so, explore the nature of this contact.
   – any examples of good practice?

20. What attempts were made to encourage the over 50’s to move into paid work?
   – how successful were they?
   – what types of issues and concerns did the over 50’s have in relation to returning to paid work?
   – to what extent was the pilot able to address these issues and concerns?
   – if no attempts were made, why not?
   – what did people consider to be the most important factor in helping them move into/consider work?

21. What happened after an individual was referred to a job?
   – was there any further contact or help?
   – If so, explore the nature of this contact.
   – any examples of good practice?
22. What attempts were made to encourage the over 50’s to take up training or education courses?
   - how successful were they?
   - what types of issues and concerns did the over 50’s have in relation to returning to education work?
   - to what extent was the pilot able to address these issues and concerns?
   - if no attempts were made, why not?

23. Were any attempts made to refer customers on to other agencies/providers (other than Jobcentre Plus) e.g. Action Teams, Employment Zones, Careers Services or other support / programmes offered by the pilot provider.
   - if so, who were these agencies/providers
   - what attempts were made?
   - how successful were they?
   - if not, why not?

24. Using some specific examples of individual customers (anonymised) who’ve accessed Jobcentre Plus services, begun volunteer work or moved into paid work, can you describe the process they went through and how their barriers were addressed?
   - what were the circumstances / reasons for this movement?
   - what accounted for the success?
   - were these customers mainly those with recent work histories/good qualifications/already highly motivated, etc?
   - would these individuals have accessed JC+ services/secured volunteer positions or jobs without their intervention?
   - what was the ‘added value’ of the outreach pilot?
   - which types of help worked best and why?
Pilot outcomes and impacts

_I WOULD NOW LIKE TO ASK YOU SOME QUESTIONS ON THE MAIN OUTCOMES AND IMPACTS OF YOUR OVER 50s OUTREACH PILOT_

25. What kind of results and outcomes did the pilot achieve?
   – is this better or worse than expected (or the same)?
   – how do they account for it being more or less than expected?

26. Roughly how many / what proportion of 50 plus customers were referred to Jobcentre Plus as a result of the pilot?
   – is this more or less than expected (or the same)?
   – how do they account for it being more or less than expected?

27. Roughly how many / what proportion of 50 plus customers were referred to voluntary work, employment or education and training as a result of the pilot?
   – is this more or less than expected (or the same)?
   – how do they account for it being more or less than expected?

28. In your opinion, would the individuals who were helped have otherwise accessed Jobcentre Plus services and/or moved into voluntary/paid work had it not been for the pilot?

29. What other outcomes did customers achieve?

30. What other outcomes did the pilot achieve?

31. What has been the overall impact of the pilot?
   – on individual 50 plus customers?
   – on the 50 plus customer group as a whole?
   – on them as an organisation?
   – on their relationship with Jobcentre Plus?
   – on their relationships with other organisations?

32. Have there been any additional (unexpected) outcomes or impacts of the pilot?
   – If so, what have they been and how did they come about?
Pilot effectiveness, strengths and weaknesses

FINALLY I WOULD LIKE TO EXPLORE WITH YOU THE ELEMENTS OF YOUR PILOT YOU PERCEIVED TO HAVE WORKED WELL AND WHAT WORKED LESS WELL AND WHAT GOOD PRACTICE LESSONS CAN BE DRAWN FOR LEARNING HOW BEST TO ENGAGE AND WORK WITH THE OVER 50s CUSTOMER GROUP IN THE FUTURE

33. Overall, what has worked well and what has worked less well in terms of meeting the overall aims and objectives of the pilot?

34. What has the pilot contributed to what we know about what works (or doesn’t work) for the 50 plus customer group and why?

35. Was the pilot able to address customers’ needs and overcome barriers?
   - if so, how?
   - if not, why not?

36. What have been the particular strengths of the pilot?

37. What would you say has been its key success factor(s)?

38. What have been its main weaknesses or problems? (what has not worked as well as expected).

39. Which aspect(s) of the pilot were most important in terms of the achievement of its key aims and objectives?
   - skills of staff?
   - venues?
   - delivery organisation?
   - type or amount of help?
   - other?

40. Given the opportunity to run the pilot again, what would you do differently and why?

41. What elements of the pilot would you maintain or like to develop further and why? What good practice has emerged from the pilot?

42. Has any good practice been used in other ways or transferred to other programmes your organisation runs?

43. What have been the key lessons learned from your organisation’s involvement with in the pilot?

44. Are there any other issues or points you would like to raise in relation to the pilot that have not been covered?

Thank you very much for your contribution
Over 50s Outreach Pilot topic guide: face-to-face interview with Jobcentre Plus pilot manager (DPQMT)

Objectives:
1. To describe and investigate the effectiveness of different pilot approaches and methods
2. To examine how effective the pilots were in terms of encouraging 50 plus individuals to use Jobcentre Plus services and move closer to work
3. To record the outcomes and impacts of the pilot and to identify any best practice
4. To increase our understanding of what works for 50 plus customers

Role and involvement in the pilot

I WOULD LIKE TO START BY ASKING YOU SOME QUESTIONS ON YOUR ROLE AND INVOLVEMENT IN RELATION TO THE OVER 50s OUTREACH PILOT

1. What is your role and main responsibilities in relation to the over 50’s outreach pilot?
2. How much involvement have you had? What proportion of your job / time has the pilot taken up and over what period of time?
3. How and when did you become involved?
4. Are any other Jobcentre Plus staff involved in the pilot?
   – if so, what is their role and responsibilities
   – what role and involvement do individual Jobcentre Plus advisers have?

Pilot design, implementation and delivery

I WOULD LIKE TO EXPLORE THE KEY DESIGN FEATURES, IMPLEMENTATION AND DELIVERY OF THE OVER 50s OUTREACH PILOT IN YOUR DISTRICT

5. When was the over 50s pilot implemented in your district?
6. Is the pilot still operating?
   – if yes, when will it end?
   – if no, when did it finish? did it end prematurely? If so, why?
7. Were there any problems or issues in tendering or setting up the pilot?
8. How closely did Jobcentre Plus personnel work with the intermediary organisation in setting up the pilot?
9. How closely did Jobcentre Plus personnel work with the intermediary organisation in implementing the pilot?

10. Can you describe the overall design and approach of the pilot in your district?
    – content of main activities / methods undertaken
    – number and location of customers targeted
    – delivery arrangements – including staff, type, number and location of venues, extent of involvement of other organisations
    – geographical coverage of the pilot - urban, rural or a mixture of both
    – did you have any involvement in the clearance of materials for publication

11. What were the pilot's most interesting or innovative features?

12. Were any changes made to the original design or content of the pilot since its implementation?
    – if so, explore what they are and the reasons why

13. How was the pilot managed?
    – was there a pilot steering group or did existing management arrangements apply?
    – what was the remit of the group and how often did it meet?
    – how involved was Jobcentre Plus?
    – how well did the management arrangements work?

14. How was the pilot monitored and reported on?
    – were the contract and reporting requirements generally met by the provider?
    – were there any issues (e.g. any data protection issues)?

15. How were individual 50 plus customers monitored and tracked?
    – how were details of individuals taken and recorded?
    – how were Jobcentre Plus referrals recorded?
    – were there any issues?

16. Was any evaluation undertaken?
    – if yes, of what sort?
    – what did it find?
    – are any reports available?
17. Did any (unforeseen) factors affect the implementation or running of the pilot?
   - if yes, what were they and what impact did they have?

18. Can you describe the referral process from the intermediary organisation to Jobcentre Plus?
   - was there a named Jobcentre Plus contact?
   - how well did referral work?
   - how were 50 plus customers identified and recorded?
   - were there any issues around referral?
   - any examples of good practice?

Pilot outcomes and impacts

_ I WOULD LIKE TO EXPLORE THE MAIN OUTCOMES AND IMPACTS OF YOUR OVER 50s OUTREACH PILOT_

19. What kind of results and outcomes did the pilot achieve?
   - is this better or worse than expected (or the same)?
   - how do they account for it being more or less than expected?
   - were the original expectations of the pilot realistic?

20. How many 50 plus customers were referred to Jobcentre Plus as a result of the pilot?
   - is this more or less than they expected (or the same)?
   - how do they account for it being more or less than expected?

21. Did the use of an intermediary organisation increase the take-up of Jobcentre Plus back-to-work help amongst older people in your district?
   - if so, explore how this has been achieved
   - what evidence is there for this?
   - what have been the key success factors
   - if not, why not

22. Did the use of an intermediary organisation increase the take-up of volunteering opportunities or paid employment?
   - if yes, explore how this has been achieved
   - what evidence is there for this?
   - what have been the key success factors
   - if not, explore why not
23. In your opinion, would the individuals who were helped have otherwise accessed Jobcentre Plus services and/or moved into voluntary/paid work had it not been for the pilot?

24. What good practice has emerged from the pilot in relation to raising the awareness and engaging 50+ customers with Jobcentre Plus services?
   – can you provide specific examples?
   – has the good practice been used in other ways or transferred to other organisations or programmes?

25. What other outcomes did the pilot achieve?

26. What has been the overall impact of the pilot?
   – on individual 50 plus customers?
   – on the 50 plus customer group as a whole?
   – on the delivery organisation?
   – on Jobcentre Plus?

27. Have there been any additional (unexpected) outcomes or impacts of the pilot?
   – If so, what have they been and how did they come about?

28. Do you believe that the pilot has provided value for money?
   – if so, in what ways?
   – if not, why not?

Pilot effectiveness, strengths and weaknesses

FINALLY I WOULD LIKE TO SUMMARISE WHAT YOU BELIEVE TO HAVE BEEN THE MAIN STRENGTHS AND WEAKNESSES OF THE PILOT, AND WHAT GOOD PRACTICE LESSONS HAVE EMERGED

29. Overall, what has worked well and what has worked less well in terms of meeting the overall aims and objectives of the pilot?

30. Was the pilot able to address customers’ needs and overcome barriers?
   – if so, how?
   – if not, why not?

31. Which aspect(s) of the pilot were most important in terms of making a successful referral to Jobcentre Plus? e.g. period of contact, type of support offered, good relationships etc.
32. What has the pilot contributed to what we know about what works (or doesn’t work) for the 50 plus customer group?

33. What would you say has been its key success factor(s) (if any)?
   - to what do you attribute the pilot’s success?

34. To what extent was having an intermediary organisation deliver the pilot important to the success (or otherwise) of the pilot?
   - did they add value to the service offered to 50+ customers?

35. Which aspect(s) of the pilot do you feel were most important in terms of the achievement of its key aims and objectives?
   - skills of staff?
   - venues?
   - outreach delivery?
   - delivery organisation?
   - type or amount of help?
   - other?

36. What have been the pilot’s main weaknesses or problems?
   - what has not worked as well as expected?

37. Given the opportunity to run the pilot again, what would you do differently and why?

38. What have been the key lessons learned from your involvement with in the pilot?

39. Are there any other issues or points you would like to raise in relation to the pilot that have not been covered?

Thank you very much for your contribution
C.5 Over 50s Outreach Pilot topic guide: face-to-face interview with Jobcentre Plus adviser

Objectives:

1. To investigate the customer referral process and the types of support and services provided to 50 plus individuals
2. To examine how effective different types of help were in terms of encouraging 50 plus individuals to use Jobcentre Plus services and move closer to work
3. To record the outcomes and impacts of the pilot and to identify any best practice
4. To increase our understanding of what works for 50 plus customers

Adviser Background

I WOULD LIKE TO START BY ASKING YOU SOME BACKGROUND DETAILS ON YOUR MAIN ROLES AND RESPONSIBILITIES, BOTH GENERALLY AND MORE SPECIFICALLY, IN RELATION TO THE OVER 50s OUTREACH PILOT

1. How long have you been a Jobcentre Plus adviser?
2. Which customer groups do you deal with and how long have you worked with these customer groups (i.e. ND50+, ND25+, etc)
3. Do the 50+ customers that you deal with via the outreach pilot differ in any way to other 50+ customers you meet (or any other customer groups you may deal with)? If so, in what way(s)?
4. When did you first hear about the 50+ outreach pilot? Did you receive any additional training and/or guidance in relation to the 50+ pilot? If so, what? If not, would you have liked any additional training and/or guidance?
5. What are your main roles and responsibilities in relation to the Over 50s Outreach Pilot.
6. Do any other staff in their Jobcentre Plus office deal with customers being referred via the Over 50s Outreach Pilot. If so, can you briefly explain what their main roles and responsibilities are?
The referral process and relationships with outreach providers

*I WOULD NOW LIKE TO EXPLORE WITH YOU HOW THE REFERRAL PROCESS WORKS WITH THE OVER 50s OUTREACH PILOT AND THE RELATIONSHIP/CONTACT YOU HAVE WITH THE OUTREACH PROVIDER*

7. What kind of relationship/contact has there been with outreach provider staff in relation to the running of the pilot:
   - which outreach provider staff do they have contact with?
   - what is the nature and frequency of the contact?
   - how effective has the relationship been?
   - any particular aspects that have worked well/less well?
   - are there any issues/concerns?

8. Can you describe how the referral process operates between the outreach provider and the Jobcentre Plus office? In particular, explore:
   - what and how much information do they have on customers being referred to them prior to meeting them (i.e. names, NI numbers, etc)
   - are customers allocated an appointment date/time prior to attending the Jobcentre Plus office or do they more informally just ‘turn up’? If so, what happens to these customers who turn up without a prior appointment?
   - do customers know in advance who they need to ask for if they attend the Jobcentre Plus office?
   - what system do they have in place for ‘tracking’ customers who have been referred to them by the over 50s outreach provider? How effectively do they believe this works in practice?
   - are they aware of any customer ever returning to the intermediary organisation after attending the Jobcentre Plus office? If so, under what circumstances?
   - any issues around the referral process?
   - any examples of good practice?

9. Which elements of the Over 50s Outreach Pilot referral process do you believe are working well and why?

10. Which elements of the Over 50s Outreach Pilot referral process do you believe are working less well and why?
Jobcentre Plus services to over 50s referrals

I WOULD NOW LIKE TO EXPLORE WITH YOU THE SERVICES YOU HAVE BEEN ABLE TO OFFER INDIVIDUALS BEING REFERRED TO YOU VIA THE OUTREACH PILOT

11. Can you describe the ‘typical’ service an individual might receive after being referred to a Jobcentre Plus office by an over 50s outreach provider? In particular explore:
   – the type of information and advice provided to the customer
   – the type of help and support provided to the customer (referrals to Jobcentre Plus programmes, financial support on offer, training opportunities, etc)
   – the number of meetings with a Jobcentre Plus adviser
   – period of contact with a Jobcentre Plus adviser

12. Explore the nature of the information and advice 50 plus customers are ‘typically’ looking for when they are referred to them? Are you able to offer them what they want/need? If so, by what means? If not, why not?

13. What types of services and information do you have at your disposal that have worked particularly well in helping this customer group?

14. Have there been any gaps/areas where you have been unable to help 50 plus customers being referred to you via the outreach pilot? If so, what have these been and how have you attempted to address them (i.e. referral to more specialist organisation, etc)?

15. Are the customers being referred to you via the outreach pilot ‘typical’ 50 plus customers that you would ordinarily be dealing with anyway, or are they different in any way? If so, in what ways are they different?

16. What are the characteristics (and proportions) of 50 plus customers being referred to you via the outreach pilot. For instance:
   – customers currently on ‘inactive’ benefits (i.e. IB claimants, partners of claimants, etc)
   – individuals not currently claiming any benefits and with little or no benefit claiming history
   – individuals not currently claiming any benefits but with a history of claiming benefits
   – what are the ages of those being referred to them (proportions both below and above state pension age)?
   – have any individuals from ethnic minority groups been referred to them?

17. Do you have a feel for why you may have seen more individuals from some of these groups over others?
18. What proportion of the 50 plus customers being referred to you have had little or no Jobcentre Plus contact in the past?

19. Do you have a feel for why these customers have been reluctant to attend a Jobcentre Plus office in the past (i.e. fear, not aware they could help, bad experience in the past, etc)?
   - what sorts of issues and concerns do they have?

20. How do you believe the Over 50s Outreach Pilot has helped to overcome these barriers? In particular explore:
   - what particular types of help/approaches or methods used by the outreach provider seemed to work best and why?
   - what were the key success factors?
   - any examples of good practice?
   - which worked less well and why?

21. What do you see as the advantages (benefits) and disadvantages of using a third party to inform/refer customers to Jobcentre Plus services?

Impacts and Outcomes

I WOULD LIKE TO ASK YOU SOME QUESTIONS ON THE GENERAL OUTCOMES AND IMPACTS THAT HAVE BEEN ACHIEVED WITH INDIVIDUALS THAT HAVE BEEN REFERRED TO YOU VIA THE 50+ OUTREACH PILOT

22. Since the beginning of the pilot how many 50 plus individuals have been referred to you (and/or their Jobcentre Plus office) via the outreach pilot?

23. Has the use of intermediary organisations to refer individuals increased the amount of 50 plus customers using your Jobcentre Plus services? If so, how do you believe this has been achieved? If not, why has this not happened?

24. What types of outcomes have you been able to achieve with the 50 plus customers referred to you via the outreach pilot (for each of the following explore what proportion of customers were helped):
   - movement on to ND50+
   - movement into work (part-time and full-time) – explore examples of the types of jobs secured
   - movement into voluntary work – explore the types of voluntary positions secured
   - movement on to training courses - if so, explore what kind
   - referral to other services/providers – explore what these have been
   - any soft outcomes – e.g. greater confidence/motivation/enthusiasm
   - evidence of help and support with personal issues – e.g. health conditions, etc
Pilot strengths and weaknesses

FINALLY I WOULD LIKE TO EXPLORE WITH YOU WHAT YOU BELIEVE TO BE THE MAIN STRENGTHS AND WEAKNESSES OF THE OVER 50s OUTREACH PILOT

25. Overall, how successful has the Over 50s Outreach Pilot been in encouraging inactive older people to access Jobcentre Plus services?

26. In your opinion, would the individuals who were referred to you via the outreach pilot, have otherwise accessed Jobcentre Plus services?

27. What have been the particular strengths of the Over 50s Outreach Pilot?

28. What would you say have been its key success factor(s)?

29. What have been its main weaknesses and problems?

30. Are there any other issues or points you would like to raise in relation to the pilot that have not been covered?

Thank you very much for your contribution
References


