AN EVALUATION OF LANCASTER AND DISTRICT 50 FORWARD

A 'LINKAGE PLUS' PROJECT FUNDED BY THE DEPARTMENT OF WORK AND PENSIONS

FINAL REPORT

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[1] We would like to acknowledge the particular contribution of Malcolm Ostermeyer into Section 2.1, Liz Rodgers into Section 4, Deirdre Jacks into Section 5, and Gill Robinson into Section 6.

EXECUTIVE SUMMARY

1. This is the final report of the evaluation of the Lancaster and district 50 Forward project, one of eight pilot projects funded by the Department of Work and Pensions in its LinkAge Plus programme. The eight LinkAge Plus projects were designed to pilot new ways of providing joined-up and more accessible services to older people. Lancaster and District 50 Forward was launched on the International Day of the Older Person, October 1st 2006, and ran until the summer of 2008. It had three strands: an Employment Service and Volunteer Bureau – offering support for older people looking for new work and volunteering opportunities; a Care Navigator strand, in which volunteers were trained to provide support on a short-term basis for older people who needed information, guidance or support which could be provided in the community; and a service providing Access to Information for older people, by telephone, email and in person.

2. The evaluation of the Lancaster and District 50 Forward project was carried out by the Department of Continuing Education at Lancaster University. Most of the fieldwork which took place for the evaluation was carried out by a group of older people who were working with the project as' volunteer evaluators'. They were recruited through the University's Senior Learners' Programme and/or from an accredited University Certificate in Research Methods for Older People.

3. The evaluation was carried out in three phases and two preceding reports have already been provided to the 50 Forward Steering Group. This report synthesizes the findings of the first two reports, and adds additional information and analysis and overarching conclusions.

4. The Lancaster and District 50 Forward Project was the only Linkage Plus pilot conducted in an area in which a district council, which did not have a responsibility for social services and care of older people, was involved. Throughout the evaluation this was identified as a major determining factor of how the project developed. The 50 Forward project was directed by a Steering Group in which older peoples' organisations played a significant role and contributed importantly to decision-making processes in collaboration with the voluntary and statutory organisations which were lead partners in the project. The three strands of the project began relatively slowly and the dynamics of the processes involved are analysed in the evaluation as indicative of the way the project would evolve. The "Memorandum of Understanding" of October 2006 between Lancaster City Council and the Department of Work and Pensions is regarded by the evaluation as the key baseline of the project, stating aspirations, goals, financial parameters and, importantly, six "critical success factors", *viz*:

    a.Introduction of joint working to lead and monitor the project
    b.Delivery of locally based low level services wanted by older people
    c.Proven access to employment and training opportunities for those aged 60 and over

d.Proven support from local employers for provision of opportunities for people aged 60 and over, including financial contributions from employers to assist long-term sustainability

e.Development of a volunteer network available to anybody who fits the criteria agreed by the LinkAge Pilot Group

f.Increased partnership working and practical support for LinkAge Plus principles across all sectors involved in service provision.

5. A Baseline statistical survey was undertaken at the start of the evaluation. It showed that providing services and support for older people would become an increasingly more important policy imperative in Lancaster and district. In 2001 just over a third of the population of the Lancaster area was 50 or above and projections to 2020 indicate a 24% rise in the number of people in this age group. In the older age groups (70+) an increasingly larger proportion would be women. Isolation was shown in the 2001 census to be a key factor with 52% of pensioner households occupied by a person living alone. Income deprivation affects about 15% of people over 60 in the Lancaster area and this is projected to become an increasing problem. 40% of people 50 or above were reported in 2001 as suffering from a limiting long-term illness

6. The evaluation conducted a wide range of quantitative and qualitative fieldwork activities . They included:

a documentary analyses

b analyses of statistical returns and reports

c initial interview study of 58 older people

d   interviews with members of the project steering group at the beginning and end of the project

e interviews with 23 early users of Employment Services and the Volunteer Bureau (late summer 2007)

f follow-up interviews with 18 Employment Services and the Volunteer Bureau users (February 2008)

h questionnaire survey of 68 Employment Services users to study their experience of seeking work as an older person (July 2008)

i interviews with representatives of employing organisations and organisations recruiting volunteers (Spring/Summer 2008)

j. interviews with 8 staff and volunteers with the Care Navigator Service (Spring 2008)

k. 22 interviews with users of the Care Navigator Service (March 2008)

l. Interviews with staff and a few users of the Access to Information Service (June/July 2008)

7. The Employment Service and Volunteer Bureau were investigated extensively by the evaluation project through a wide range of fieldwork methodology. In summary, the performance of both services was strong with the Employment Service registering 102 clients and the Volunteer Bureau recruiting 272 volunteers, both in periods of 15 months or so. The conduct of both services was shown to be systematic with efficient attempts to track and to keep in touch with clients. Not all users reported that they had been helped by the services but many of those surveyed were very positive in their comments and, whether or not they had been placed, believed that the services had been as helpful as circumstances allowed.

8.The Care Navigator Service was also investigated by a range of fieldwork methodology. It operated within a clearly worked out philosophy of levels of support for clients and, as far as possible, all enquiries or needs being

followed up or passed to a partner organisation. Numbers of contacts were significant. The Service made contact with 1053 clients in a period of 15 months. There were plentiful examples of referrals from the statutory agencies to the Care Navigator Service. Demands on volunteers could be considerable and there was evidence of regular turnover of volunteers.

9. The Access to Information Service played a minor role in the project because it only began during the last few months of project activity. The reasons for delay are discussed in the evaluation report. There is no doubt that the 50 Forward project would have been stronger if the Access to Information Service had begun in, say, late 2006. In its few months of operation in Spring 2008, it showed considerable usage and potential.

10. In the interviews with members of the Project Steering Group at the time of project closure, 5 major achievements were identified:

      a. the project had demonstrated the success of a different way of working with older people, namely emphasising the provision of low-level preventative services aiming to prolong the independence in the community of older people
      b. there had been an equality between project partners, statutory, voluntary and older peoples' organisations alike. The project had thus been creative in its ways of working and able to emphasis holistic approaches and mutual support
      c. the philosophy of the efficacy of preventative services had spread beyond the project to be accepted by professional and voluntary workers who were not partners in the project
      d. because of the work of the project, there was a wider acceptance among professional and voluntary workers, employers, and older people themselves of older age as a positive phenomenon
      e access to services for older people in outlying and rural areas now had a higher profile because of the project

11. The interviews with members of the Steering Group, and other sources, variously highlighted difficulties, issues and frustrations which had accompanied the development of the project, eg:

      a. the timescale of the project was held by many participants to be too short for effective achievement of all which the project was funded to achieve. There was a particular frustration in not having enough time to deploy all the financial resources which were available.
      b. the delay in establishing a proper office base for the project, and the different locations of the three project strands, had negative consequences
      c. expectations of reliance on extensive use of volunteers brought with it considerable need for resource, expertise and good practice. Volunteers needed consistent support, training, and mentoring and also cover in place for inevitable turnover in volunteers.
      d. internal and external communications, while not giving rise to any particular problems, could have been better developed in the project. There would, for example, have been a place for an internal newsletter. A project website would have been a useful flagship as well as a further means of binding the project together and publicising it to potential clients and partners.

12. The evaluation report documents changes during the project lifetime in the budgeted balance of expenditure between project management and administration (increased); delivery and implementation through the three strands (decreased) and evaluation (remained static). The final balance of

expenditure (June 2008) was project management and administration 33%; delivery (cost of the three strands) 59%; evaluation 8%. The report notes that 17.5% of the original project grant was returned to the Department of Work and Pensions in February 2008 because of the late start of the Access to Information service.

The report discusses the limited validity of "value for money "analyses in projects of this nature and notes that certain financial data was not available to this evaluation that would make some analyses possible. One calculation suggests that in the Employment service the cost per client placed was £780 and in the Volunteer bureau £564. The cost calculated for each contact of the Care Navigator service (that was recorded as having been successful) was £148. Thus, using what data is available, the report makes a partial case that the Employment Services and Volunteer Bureau, and the Care Navigator services, represent value for money.

13. The evaluation report sought to summarise and conclude by comparing project outcomes with published criteria of the LInkAge Plus scheme . 12 criteria were extracted from LinkAge Plus publications and divided into system-related, development –related and person-related criteria. They are::

System – related criteria

1. a robust evidence base to support the case for joined- up services in terms of delivering better outcomes for older people.

2. an evidence base that supports the economic case for fully joined up/holistic services for older people.

3. a test of the limits of holistic working

4. a body of good practice and lessons learned for other partnerships and communities thereby encouraging wider application of the approach, beyond pilot sites.

Development-related criteria

5.Volunteers or paid 'mentors' who support vulnerable people to access and negotiate their way around available services

6. involving older people in the design of the services

7. outreach activity to take services out to people who would not otherwise access services they need

8. 'drop in' type resource centres providing a single access point to multiple services

9. an aspiration for 'no-door to be the wrong door' for access to the range of services required by an individual.

Person-related criteria

10. quality of life improvements for older people

11. improved well-being and independence

12. accessibility and efficiency.

The evaluation report suggests that the Lancaster and District 50 Forward Project made a positive and recognisable contribution to all of these criteria, with the exception of criteria 8, which is not relevant. The contribution to criterion 2 was limited. However, the report considers that the performance against criterion 6 was outstanding and that against criteria 3,4,9,10,11,12 was strong.

14. The evaluation report concludes by presenting the same conclusions in a different way by listing five **Key Outcomes** of the Lancaster and District 50 Forward Project. The evaluation has shown that:

a. a project of this nature can be carried out within a District Council which has not had responsibility for the provision of caring services for older people and can, in fact, benefit positively from the absence of pre-established lines of responsibilty, working practice, patterns of communication and precedent.

b. an employment service for older people can be established *ab initio* and function effectively in a project of this nature and can make important positive differences to older people's lives and opportunities

c. The co-location of Employment Services and a Volunteer Bureau can lead to many exciting and unexpected spinoffs and particularly useful opportunities for older people.

d. the principles of the care navigator service - a non- crisis, time-limited, low-level information and support service - can promote independence of older people in the community and improve their quality of life in a significantly cost-effective manner

e.basing a project such as this on expressed needs of older people and giving representatives of older people a significant role, and decision-making powers, in the project makes success and relevance much more likely and demonstrates the value of going beyond mere rhetoric on this point.

f. there will be a lasting project legacy in the District of positive attitudes on the contribution of older people to society and of the recognition of the need to consult older people on the provision of services which affect them and to encourage their involvement in related decision-making.

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1. Introduction: Policy Context and the Local Evaluation Approach

1.1. National Policy Context

Lancaster District 50 Forward was one of eight pilot projects financed by the Department of Work and Pensions - each for about two years - in the period 2006-8, as part of the LinkAge Plus programme. The programme was also supported by the Department of Communities and Local Government and the Social Exclusion Unit. LinkAge was originally introduced nationally by DWP in 2004. It sought to link together the range of services provided to older people and initially it promoted joint central and local government teams, availability of alternative offices for social security claims in local voluntary organisations and local authorities and pilot projects to try to increase the take-up of benefits by older people.

The LinkAge Plus programme, valued at £10 million, emerged from proposals in '_Opportunity Age – Meeting the challenges of ageing in the 21st century_', published in March 2005. This claimed to be the first ever cross-government strategy specifically focused on the issues facing society as people live longer, healthier lives. One commitment in the report was to build on the perceived success of the initial Link-Age programme and to pilot a LinkAge Plus service which would provide access to fully integrated services for older people.

The commitment was subsequently reinforced by the publication of the Social Exclusion Unit report '_A Sure Start to Later Life'_ in January 2006. This report suggested that the Sure Start approach in energising communities and reshaping children's services, could work equally well with older people. The Sure Start principles of service delivery would require a service that is locally aimed, joined up, non-stigmatising, accessible and economically effective.

As it evolved in 2006 the LinkAge Plus programme was declared to have four objectives.
1) To build a robust evidence base to support the case for joined up services in terms of delivering better outcomes for older people.
2) To build an evidence base that supports the economic, as well as social, case for fully joined up/holistic services for older people.
3) To test the limits of holistic working.
4) To build a body of good practice and lessons learned for other partnerships and communities, thereby encouraging wider application of the approach, beyond pilot sites. (Davis & Ritters, 2007)

During the winter 2005 – 6, eight local authority based pilot sites were selected. Table 1 below lists them (with the information which we have been able to gather to date):

Table 1 LinkAge Plus Pilot Areas

Local Authority	Project title	Main Emphases	Key Partners	DWP Grant
Devon	Link Age Plus	1. Senior Council 2. Customer Service Centre 3."Deep Outreach" (mentoring)	1.Devon CC 2.Age Concern 3. Upstream Healthy Living Centre 4.AGILE – Devon Action Group in Later Life	£900,000
Gateshead		1.Forum for Older People 2. Network of Preventative Services 3. Information 4. Healthy Living	1.Gateshead Metropolitan Council 2. Gateshead Health and Social Care Partnership	
Gloucestershire		30 Village Agents – access to information and supporting referrals	1. Gloucestershire County Council 2. Gloucestershire Rural Community Council	c.£1,000,000
Lancaster	50 Forward	1.Employment 2.Care Navigator 3.Access to Information	1.Lancaster City Council 2.Lancashire County Council 3.Age Concern Lancashire 4. Forum for the Older Person 5.Signposts *and others named in this report*	£700,850
Leeds	Leeds Linkage Plus	1.Capacity-building in voluntary sector 2. InfoStore 3. BME Focus Group	1. Leeds City Council 2. Leeds Older Person's Forum	£967,000

		4. Social Isolation		
Nottinghamshire	Notts50plus	1.Activity Friends 2. Web Portal 3. First Contact Signposting	1.Nottinghamshire County Council 2,.Nottinghamshire Rural Community Council 3. Nottinghamshire Fire and Rescue Service *and many others*	£1,000,000
Salford		1.Referral Network 2.Web-based Directory 3.Housing Choice 4. Healthy Hips and Hearts	1.Salford City Council 2. Salford Primary Care Trust 3. Salford Forum of Older People	£1,131,000
Tower Hamlets	Tower Hamlets LinkAge Plus Partnership	1.Single Access Gateways to .benefits advice; housing advice; programmed activities; health promotion etc.	1. London Borough ofTower Hamlets 2.Age Concern 3. Neighbours in Poplar 4.Toynbee Hall 5. Somali Gardens	£950,000

National coverage was clearly one criterion for selection of the pilot areas; coverage of services (housing, transport, health and social care, work and volunteering opportunities) another and, in the case of Lancaster, inclusion of a local authority which had not previously been involved in social service and care provision. Indeed, some at least of the areas chosen for Linkage Plus were approached by DWP because they had recently submitted unsuccessful bids to the Department of Health for funding under the "Partnerships for Older People's Projects" (POPPS) Programme and had well-developed, relevant proposals ready to be adapted to the criteria of a parallel but related central funding programme. Only "Councils with Social Service Responsibilities" (CSSRs) had been able to bid for POPPS funding to the Department of Health "to establish innovative pilot projects in partnership with Primary Care Trusts, the voluntary, community and independent sector …to deliver improved outcomes for older people through greater investment in prevention". £60 million had been made available under POPPS between 2006 – 2008. The 29 proposals funded were judged, in many different ways, to offer "more low-level care and support in the community to improve the health, well-being and independence of older people preventing or delaying the need for higher intensity and more costly care ".(Dept of Health Circular 2007).

The shared values and aims of the POPPs and Linkage Plus Programmes need no further explication. Clearly the two government departments were acting in concert. Since the Department of Health was funding only CSSRs, it fell to DWP to fund at least one pilot in a council without direct responsibilities for services to older people. Hence the offer to Lancaster. However successful or not the Lancaster 50 forward pilot was to prove, its experience would provide necessary and important data for DWP on which to base later development of services for older people nationally. What Lancaster City Council had to do first, however, was to develop a proposal *ab initio* which would meet Linkage Plus criteria.

To find the criteria was not difficult. They were laid out clearly in current DWP literature. In summary, several key design and operating principles provided the basis for the development of notions of "joined-up/holistic services for older people ", i.e

- volunteers or paid 'mentors' who support vulnerable people to access and negotiate their way around available services
-
- involving older people in the design of the services
-
- outreach activity to take services out to people who would not otherwise access services they need
-
- 'drop in' type resource centres providing a single access point to multiple services
-
- an aspiration for 'no-door to be the wrong door' for access to the range of services required by an individual.

Moreover, the DWP included in the LinkAge Plus design not only a national evaluation (conducted by the University of Warwick) but also expected each of the eight pilot areas to build its own monitoring and evaluation strategy into its proposal. It indicated that it expected the evaluations to explore the pilots' outcomes on a number of areas including:

- quality of life improvements for older people

- improved well-being and independence

- accessibility and efficiency.

Despite this clarity of aims, the Lancaster 50 Forward proposal to DWP took some time to reach its final shape. In the end, however, the DWP proved to be right. The project which emerged in Lancaster and district, from its very beginning, provided indicative data on the issues, advantages and difficulties of placing a project seeking to achieve Linkage plus outcomes with a council which did not have a track record as a service provider.

1.2. Local Policy Context

After the initial DWP approaches, and before any final decision could be reached, each pilot area had to prepare a proposal showing how it would

develop the LinkAge project and what it would cost. There was no requirement for additional services, as such. The focus was primarily on joint and joined-up working. Proposed start date for projects was initially April 2006 but there was slippage.

Our information is that Lancaster City Council was immediately interested in taking part in a pilot and was strongly supported by Lancashire County Council and, in particular, its team in Older People's Services. But Lancaster, as a district council, had no obvious *locus* in its structure in which to site the project. By spring 2006, DWP was aware of Lancaster's difficulties and offered help in preparing a proposal. They seconded a DWP member of staff who had become available and that person became the link to prepare the proposal and get the LinkAge project started.

The Lancaster pilot began with a number of advantages. Firstly, it was decided to appoint a project manager who would have no prior loyalties to any specific organisation, and could focus solely on the project. Additionally there was i) significant enthusiasm and commitment from the local Older People's Partnership and Older People's Forum, ii) the determination and support from Lancashire County Council who allocated staff time to supporting and kick-starting the project, iii) the enthusiasm of staff within Lancaster City Council who provided details of services that would be relevant to LinkAge and provided ideas of how those services could be enhanced under the LinkAge banner,iv) the commitment of everyone involved to make sure things were moved quickly, enabling a draft proposal to be submitted to the city council cabinet and DWP within a couple of months of the start of drafting. Ideas for the project were moved primarily by email and telephone. Those involved included staff in Lancaster City Council, Lancashire County Council and representatives of the Older People's Forum and Older People's Partnership. Thus, at a very early stage, Lancaster was already moving towards one of the LinkAge principles of working in partnership and involving older people at all stages from planning through delivery to receiving services.

Three key decisions set the scene for 50 Forward at this early point and underpinned how the different groups would work together co-operatively:

1) the project should be managed and directed by a joint Steering Group. This was partly due to Lancaster City Council being unable to manage the whole project from within.
2) the Chair of the initial working group, later the joint Steering Group (also called " the Board") should be a representative from the Older People's Partnership. This had the benefits of introducing the principle of older people groups and representatives working in partnership with public organisations. Equally important, it prevented any individual organisation from imposing its own standards, policies or ideas at the expense of others and helped to enforce the principle of equality between partners.
3) for the sake of flexibility and speed of response, and in the spirit of shared responsibility, it was agreed during the early summer of 2006 that Age Concern Lancashire would employ the project staff. We were told that this was the beginning of changed ways of working for both Lancaster City

Council and Age Concern Lancashire. For example, the project manager was to be a key member of staff of the project. Lancaster City Council, while retaining responsibility and ownership of the project, did not recruit or contract the project manager. Age Concern Lancashire handled the recruitment but accepted that not only its own but relevant parts of Lancaster's policies would be incorporated into the recruitment advertisement. Moreover, Age Concern Lancashire wrote into the job description and requirements that although it was the formal employer, the project manager would work to, and be accountable to the officer responsible for 50 Forward in Lancaster City Council. This arrangement continued throughout the project.

A major concern of the 50 Forward pilot was to be that of developing a model of working together which reflected the fact that older people's services were, on the ground, divided between a number of agencies. There was the additional need to ensure that people living in the outlying parts of the City Council area were covered by the project and that provision was not just focussed on those living in the city itself and in Morecambe.

Early consultation meetings in 2006 undertaken to plan the project had highlighted the fact that, whereas there was thought to be available a good range of local services for older people, they tended to be fragmented and not all known to each another. Consequently, enabling partners (and subsequently users) to obtain an overview of local provision, and then navigate their way through it, was a major local policy concern.

Another was to enable older people to benefit from paid work for longer. Consequently, employment advice, which was empathetic to the needs of older people, was put forward – initially by the Forum for the Older Person - as a very important part of the overall 50 Forward package. It was felt that older people did have particular difficulty in finding work in the area, and that employers and some employment advisers did not attach sufficient value to the skills and experiences of those who were 50 years old or older. Both formal and anecdotal evidence indicated that older job seekers lost confidence, especially if they sensed that those helping them return to work thought their prospects were poor. Hence 50 Forward employment advisers who catered just for the older person were likely to provide advice in a more positive manner and discuss flexible routes back into the job market which might include periods of learning and volunteering. They could also make links with sympathetic employers and other organisations who might be particularly open to taking on older people as employees and volunteers; and could go some way to challenging the stereotypes which might be held about what older people might have to offer.

Following this consultation process it was decided to base the 50 Forward pilot on three main themes:

- An Access to Information Service which would help older people find out what support was available;
- A Care Navigation Service which would provide practical support in helping older people access services;

- A specialist Employment Service and Volunteer Bureau that would cater for the needs of the older job seeker and those interested in volunteering.

1.3. Local Evaluation Approach

The local evaluation of the 50 Forward project was managed by staff at Lancaster University's Department of Continuing Education with consultancy provided by the Centre for the Study of Education and Training at the University.

A distinctive feature of the evaluation methodology was the decision (taken in the light of the project's overall philosophy) that field work, appropriately supervised, should be undertaken by a team of older people. These 'volunteer evaluators' (as they came to be called) were drawn from those who had taken an accredited programme of Lancaster University - the Certificate in Research Methods for Older People. Some were also drawn from a new 'Senior Learners' Programme' which had begun at the University in October 2006. As the evaluation progressed the team was joined by others, even including a volunteer who had been referred from the 50 Forward Volunteer Bureau. In this way, the evaluation was by its very operation contributing to improvements to the opportunities available to older people in Lancaster.

At the start of the project the volunteers were given introductory training in general evaluation techniques, questionnaire and interviewing skills. Supervised and led by the evaluation project manager, they had a major influence on the design of the questionnaires used during the evaluation to ensure that the questions asked and response categories offered actually reflected the experience of older people. Moreover, they brought to the study a wealth of experience in such occupational areas as social work, occupational therapy, the civil service and nursing.

Therefore, the evaluation was strengthened by having the experiences of older people studied by a group of older people themselves. Nevertheless, it was unreasonable to expect such a group to undertake an evaluation that would require the expertise and resources of a full time, professional evaluation unit. Consequently, and bearing in mind that a national evaluation of Linkage Plus was being undertaken by Warwick Business School, it was decided that the local Lancaster evaluation would primarily adopt a qualitative approach which would provide a series of case studies which would complement the overall findings produced by the national evaluators.

The appropriateness of this approach became apparent when the data gathered by the volunteer evaluators was analysed. It was primarily based on relatively small samples but it did provide a fascinating flavour and insight into the value that was being provided by the 50 Forward programme. Data such as this, of course, cannot be used to make a straight forward 'business case' for 50 Forward, and even the national evaluators have noted that such a case stretched normal evaluation methods.

An important additional refinement in the Lancaster evaluation approach has been the maintenance of a "feedback" loop with the service providers during the lifetime of the evaluation. As evaluation reports were produced, the former DWP consultant who had been involved in the initial bidwriting process and who was known to and trusted by the 50 Forward Steering Group, met with each of the teams to discuss the element of the report which concerned their work. In this way the staff teams were able to comment on the findings of the evaluation, and recommendations made during the evaluation process were discussed by the project teams.   Thus, the evaluation process sought to be 'formative' as well as 'summative'.

 When read in its entirety the local Lancaster data does provide a convincing case for the very positive impact 50 Forward made in Lancaster and Morecambe and in the surrounding area, and the evidence indicates that the pilot delivered much of what the partnership board had planned. Furthermore, because much of the data is presented through the words, emotions and experiences of older people themselves, it complements the quantitative data about Linkage Plus which has been gathered from other sources, such as monitoring information from the projects; and reports from the team from Warwick Business School who are carrying out an evaluation of the national LinkAge Plus project.

1.4. Evaluation Activities

The volunteer evaluators collected data working to a timetable of three reports. First, a baseline survey report which provided some essential data depicting the overall experience of being an older person in Lancaster and surrounding districts together with basic statistics on older people in the district; and an account of the process by which the 50 Forward pilot was developed and launched. Second, a progress report which was primarily concerned with the impact being made by each of the three 50 Forward strands. Third, this final report which draws final conclusions by re-visiting the existing data and adding new information obtained from partners and other stakeholders as the pilot project reached its conclusion.

The bulk of the data for this evaluation was gathered from interviews and from questionnaire surveys based on samples of users of each of the three strands. Short evaluation reports written by volunteer evaluators following visits have also been used. As the evaluation progressed it was apparent that the volunteer evaluators were particularly good at obtaining rich, qualitative data from interviews.

It was also apparent that conducting larger questionnaire surveys was more problematic; although the users of the Employment Service and Volunteer Bureau responded in good numbers to written questionnaires and we were able to have face to face contact with a reasonable sample of that group, some of the more vulnerable older people who had made use of the Care

Navigator service found it difficult to recall details of their experiences in a form that they could enter on a questionnaire and were sometimes unable to attribute the help they received to a particular agency or service. Consequently, smaller surveys conducted by face to face or telephone interviews provided more valid and reliable data even though this method was more time consuming and resulted in smaller samples being reached.

For these reasons, and also because the 50 Forward staff were increasingly able to provide quantitative data on the number of clients they worked with and their outputs, the local evaluation became more concerned with providing examples which would be interpreted alongside the management information statistics provided by 50 Forward staff and included, with commentary, within this report.

1.5. Report Structure
In order to ensure that all the key evaluation findings are available in one source, this final report is based on the following structure.

Chapter 2:   The Baseline Survey
Chapter 3:   Designing and Developing the 50 Forward Pilot
Chapter 4:   The Employment Service, the Volunteer Bureau and Time Banks
Chapter 5:   The Care Navigation Service
Chapter 6:   The Access to Information Service
Chapter 7:   Working Together: Providing 'Joined-Up' Services for Older People. Achievements, Lessons Learned and General Conclusions

2. The Baseline Survey

2.1. Key Background Statistics

Demographics

Table 2 below shows that in 2001 just over a third (46839, equivalent to 34.9%) of all persons living in the Lancaster Local Authority Area was aged 50 and over. 17.1% fell into the 50 to 64 age grouping, while 17.8% were aged 65 and over

Table 2: Age profile of All Persons in Lancaster Local Authority Area (2001 Census data)

Age Group	Number of Persons	% of all Persons
<1 year to 49	87175	65.1%
50 to 54	8926	6.7%
55 to 59	7390	5.5%
60 to 64	6595	4.9%
65 to 69	6368	4.8%
70 to 74	5941	4.4%
75 to 79	4957	3.7%
80 to 84	3411	2.5%
85 to 89	2115	1.6%
90 and over	1136	0.8%
Total	133914	100%

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Table 3: Age profile of All Persons aged 50 and over in Lancaster Local Authority Area (Office for National Statistics: 2007 Mid-Year Population Estimates and 2020 Estimate)

Table 3 below shows that the 2007 Mid-Year Population Estimates forecast a 4% rise in the number of persons aged 50 and over in the area, from 46839 to about 49000.

Age Group	2007 Estimate		2020 Estimate		% Growth, 2007 to 2020
	Number of Persons	%	Number of Persons	%	
50 to 64	24700	50.4%	29300	48.0%	+18.6%
65 to 79	17400	35.5%	23000	37.7%	+32.2%
80 and over	6900	14.1%	8700	14.3%	+26.1%
Total	49000	100%	61000	100%	+24.5%

In Table 3 an increase is particularly noticeable in the 50 to 64 age group. Further projections to 2020 indicate a 24% rise in the number of persons aged 50 and over, with the highest level of increase (32%) being in the 65 to 79 age group.

Table 4: Age profile of All Persons by Gender in Lancaster Local Authority Area (Office for National Statistics: 2007 Mid-Year Population Estimates)

Age	Male		Female	
	Number	%	Number	%
50 to 54	4000	49.4%	4100	50.6%
55 to 59	4400	48.9%	4600	51.1%
60 to 64	3700	48.7%	3900	51.3%
65 to 69	3100	47.7%	3400	52.3%
70 to 74	2700	45.8%	3200	54.2%
75 to 79	2100	42.0%	2900	58.0%
80 to 84	1400	38.9%	2200	61.1%
85 and over	900	27.2%	2400	72.8%
Total	22200	45.5%	26600	54.5%

Table 4 shows that the 2007 Mid-Year Population Estimates forecast that slightly over half (54.5%) of the persons aged 50 and over in the area would be female. In line with national figures, the relative proportions of males and females change markedly with ageing.

Office for National Statistics data for 2000-2002 gave a life expectancy estimate of 74.8 years for males and 80.2 years for females in the Lancaster area.

Household Tenure

Table 5: Household tenure of All Pensioner Households in Lancaster Local Authority Area (2001 Census data)

Tenure type	Number of Households	% of Households
Owned	13510	77.8%
Rented from Council	1489	8.6%
Other Social Rented	814	4.7%
Private Rented or Living Rent-Free	1556	9.0%
Total	17369	100%

Table 5 shows that in 2001 over three-quarters (77.8%) of pensioner households were owner-occupied. About 52% of pensioner households were occupied by a person living alone.

Economic Status

State Pension Claimants

Department of Work and Pensions data for 2007 showed that there were 27470 claimants of State Pension in the Lancaster area, with the average amount received being £90.92. 6670 were claiming Pensioner Credit. In terms of claiming incapacity benefit and Severe Disablement Allowance, there were 2390 persons aged between 50 and 59 claiming these benefits in Lancaster in 2004 and a further 1055 persons aged 60 and over claiming.

Jobseeker's Allowance

In August 2007 there were 265 people aged between 50 and pensionable age who were looking for work at least 40 hours a week and were thus in receipt of Jobseeker's Allowance. This total represented 16.8% of people claiming this benefit in the Lancaster area, compared to 13.8% in the North-West as a whole.

Income Deprivation

Income deprivation affects about 15% of all persons aged 60 and over in the Lancaster area (see Table 6). However, this is highly variable in its occurrence around the various electoral roll areas that make up Lancaster, ranging from as low as 5% in the Slyne-with-Hest area to well over 20% in some of the wards that make up Morecambe (for example, Poulton 24.6%, Harbour 21.8% and Heysham North 22.5%). With a predicted 24% rise in the population of persons aged 50 and over by the year 2020 it can be seen that income deprivation might also be an increasing problem.

Table 6: Income Deprivation Affecting Older people (60 and over) in Lancaster Local Authority Area (2001 Census data)

Ward	Number of Persons aged 60 and over	Number of Persons aged 60 and over affected by Income Deprivation	% of Persons aged 60 and over affected by Income Deprivation
Bare	1677	222	13.3%
Bolton-Le-Sands	1081	82	7.6%
Bulk	1223	271	22.2%
Carnforth	996	169	16.9%
Castle	1066	230	21.6%
Dukes	354	57	16.0%
Ellel	945	77	8.1%
Halton-with-Aughton	595	61	10.3%
Harbour	1420	309	21.8%

Heysham Central	1308	263	20.1%
Heysham North	1083	244	22.5%
Heysham South	1293	156	12.1%
John O'Gaunt	1047	126	12.0%
Kellet	599	36	6.0%
Lower Lune Valley	1168	93	8.0%
Overton	603	76	12.6%
Poulton	1805	445	24.6%
Scotforth East	1137	156	13.7%
Scotforth West	1188	128	10.8%
Silverdale	734	59	8.0%
Skerton East	1188	232	19.5%
Skerton West	1300	322	24.7%
Slyne-with-Hest	1414	70	5.0%
Torrisholme	2286	193	8.5%
Upper Lune Valley	610	39	6.4%
Warton	613	56	9.1%
Westgate	1721	349	20.3%
Total	30454	4520	14.8%

Health

2001 Census data show that about 19,200 persons aged 50 and over in the Lancaster area suffer from a limiting long-term illness; this is about 40.3% of this age group.

The most recent data available, for April 2002 to March 2003, show that there were 15573 hospital episodes for persons aged 60 and over in the Lancaster area.

Safety

Data from Lancaster County Council for the year 2003 show that there were eight elderly persons killed or seriously injured in road accidents; this was equivalent to 9% of all persons killed or seriously injured in road accidents. Three of these persons were pedestrians.

In terms of feeling safe, a 2005 survey of just over 200 respondents aged 45 and over in the Lancaster area found that the particular environment mentioned was a crucial factor – see table 6 below.

Table 7: Feelings of Safety in various situations (Life in Lancaster, citizen's panel. Better Government for Older people, 2005)

Situation	Feeling of safety				
	Very safe	Fairly safe	Fairly unsafe	Very unsafe	Don't know
In own home during day	53%	46%	0%	0%	0%
In own home after dark	44%	52%	3%	1%	0%
Travelling during day	17%	56%	22%	2%	3%
Travelling after dark	8%	36%	39%	13%	5%
In town centre during day	7%	59%	25%	5%	4%
In town centre after dark	3%	22%	45%	24%	6%

Table 7 shows that, during daylight hours at least, the majority of respondents felt to some extent safe in all environments, although it should be noted that nearly a third (30%) said they felt to some extent unsafe in the town centre during daylight. However, while most respondents felt safe in their own homes at night, the majority (52%) said they felt unsafe travelling. Over two-thirds (69%) said they felt unsafe in the town centre at night.

Conclusions :The Significance of these Statistics for 50 Forward

The figures show that providing services and support for older people will become an increasingly more important policy imperative. In 2001 just over a third of the Lancaster area population was 50 or above and projections to 2020 indicate a 24% rise in the number of people in this age group. In the older age groups (70plus) an increasingly larger proportion will be women.

Isolation is a key factor with the 2001 census showing that 52% of pensioner households were occupied by a person living alone. Income deprivation affects about 15% of people over 60 in the Lancaster area and this is projected to become an increasing problem. Also 40% of people 50 or above are reported as suffering from a limiting long-term illness.

Consequently, it can be seen that the work planned and carried out by the Lancaster and District 50 Forward project was important, timely and, if successful, likely to be relevant to a significant sector of the local population.

<u>2.2. A Survey of a Sample of Older People</u>

In order to provide the evaluation with a sense of what older people were currently experiencing in the Lancaster area, a survey was carried out at the start of the evaluation. Our team of volunteer evaluators – who came from all over the Lancaster and Morecambe district and further afield - was asked each to contact five older people to interview. The group (an opportunity, or 'opportunistic' sample) was expanded by interviewing some people who lived in a sheltered housing complex, and some people who attended a day centre for housebound elderly.

In this way, information was gathered from a total of 58 older people, who completed detailed interviews, mostly by sitting down with one of the evaluator team.

The sample was made up of 12 men and 46 women. 24 were between the ages of 50 and 69 and 34 were 70 years or older.   Whilst the sample does contain more women then men, it covers a wide range of ages and living situations. Most of the sample either lived in district LA1 close to the centre of the city or in LA4, Morecambe. About a third of the sample was living with a spouse or partner and another third was living alone. Most were living either in their own home or rented accommodation.

The sample was reasonably well educated. Just under half had stayed in full-time education beyond 16 years of age and just under half had returned to learning as mature students.   Interviewees were also asked to list their highest qualification, and although there was some slippage in terminology as the nature of qualifications has changed over the years, eight listed postgraduate degrees, five first degrees, eight had teaching qualifications and six professional qualifications. Again this indicates a well educated sample and reflects the type of person who were known to the evaluators. Most of the sample were not 'known to social services' so the responses to this baseline survey was likely to provide some indication of possible later 'low level need' by elderly people; just the kind of people that the LinkAge Plus pilots were designed to reach. Otherwise, this sample (clearly not fully representative of the total age cohort) provided a useful "range-finder" for the evaluation team at the beginning of the investigation.

The main findings from this survey were:

Current Employment Status

- Just eight people in the sample were currently working: four full-time and four part-time. 42 were retired and the others did not have clear-cut employment status: for example, women who gave up work when they had married.

- Those who had formally retired had mainly done so at age 56 or above. Poor health was the most frequently given reason for retiring below 60 and there was also some evidence of "repeated retirement."

- There was very little interest in working beyond pensionable age; only five expressed an interest in this. However, there were some signs that more would be interested if they could work part-time and have flexible hours. Many were finding their leisure pursuits more interesting than their jobs had been.

Caring, Volunteering and Active Citizenship

- 19 people were involved in caring, with a larger number – 26 – doing some form of volunteering. A basic distinction was made between informal caring and formal volunteering, that is through an organisation such as a charity.

- One of the most distinctive features in the sample was the fact that people either did a lot of volunteering or caring, or none at all. There was very little interest shown by respondents in doing more volunteering: as we have said, many were already fully engaged in caring for family members or neighbours, or in voluntary work.

Social, Leisure and Exercise

- The sample appeared to have fairly busy social lives. 50 gave examples of what they were doing. At least eight different types of activity were listed with general 'keep-fit' (including dance) the most popular (mentioned by 26) followed by visits to a community centre (mentioned by 11), and arts/ drama/music and continuing education (both mentioned by 10).

- There was a considerable amount of interest in doing more activities with 17 saying they would be interested, 25 that they would not and 15 not being sure. Quite a number of factors were identified as enabling more social activities to be undertaken. Being held at a convenient venue and being free or with little cost were amongst the most important.

Financial

- 14 people thought it was important that they improved their finances with 23 stating it was not that important and 16 saying it was unimportant. (Previous questions about occupations suggest that a number were receiving local government or teacher pensions). Only

five thought returning to or continuing in employment would be their chosen way of increasing their income, with 13 looking towards increased pensions or returns from investments. However, 11 indicated that whilst increased pensions were likely to be the main source of income, some form of employment was not ruled out.

Remaining Independent

- As we have indicated, most of the sample regarded themselves as being completely independent and not in need of that much support. For those who were less independent it was in the areas of managing a health problem (mentioned by 14) or transport (mentioned by 7) where help was needed most. The most obvious feature of the data was that notions of independence depended on the availability of help from partners and immediate family. People felt more independent if the help they needed could have been provided by family members. Receiving help, even of a minor nature, from an outside agency reduced the feeling of independence.

- Although not the most important issue in strictly numerical terms, feeling lonely and not "having someone to talk to" was a particularly striking feature of some of the 'write in comments' on the questionnaire. Isolation made even minor problems appear worse. There were also several examples of personal sadness brought about by losing a spouse or having children who no longer kept in touch.

Remaining in Home Longer

- Remaining in their own home for longer was an area where people in the sample noted there currently was (or where there was likely to be in future) a problem. This was mainly to do with the ageing process and finding it increasingly difficult to do jobs around the house culminating in a situation where living at home was no longer a viable option.

- Currently only 20 people in the sample were experiencing difficulties living in their own home. The most frequently mentioned difficulty (20 people) was a health issue but generally growing older made it more difficult to undertake the odd 'do it yourself jobs' (7 people) and to look after the garden (6 people).

Quality of Life

- Respondents were asked to record changes in their lives as they had aged, and most people in the survey were reasonably positive about growing older. For many life had got better or at least not worse.

However, for 12 of the 58 the quality of life had mostly decreased and six were not sure.

By far the main factor in causing problems amongst older people was health with 23 stating that better health would be the most important thing in improving the quality of their lives.

2.3.   The Implications of the Survey Findings

Growing older

The survey results show how the experience of growing older in Lancaster and district varied considerably from person to person. For a reasonably large proportion of the sample, ageing was something with which they could cope and towards which they had a realistic but positive attitude. It brought opportunities, chiefly more leisure time, as well as the obvious problems. This increased leisure time seemed to be a key factor in attitudes to growing older. If the older person was able to fill it with enjoyable and rewarding activities, old age could be seen as a 'bottle half full' that is, a chance to break away from the routine of working life. Within the sample there was much evidence of people using their leisure to undertake volunteering, to join in social activities and to have more time for family and other people.

For others, in this case a minority of the sample, ageing was more of a 'bottle half empty'. Poor health, money worries, feeling isolated and lonely and less capable of looking after yourself made filling this extra leisure time far more of a challenge. When compared to their memories, or at least perceptions of their younger days, their quality of life had diminished.

Even for those for whom growing old was a fairly positive experience, there was still the unalterable fact that as they became older still and moved into their late 70's or early 80's the difficulties which they had not encountered in their 60's or early 70's would eventually have to be faced. Health appeared to be the main factor.

Consequently the notion of 'old age' or 'elderly' was very fluid and began considerably earlier or later for different people. For example, the data suggested that for those with good health, a reasonable income and who enjoyed the benefits of a rewarding family and/or social life, what is commonly understood to be 'old age' was something that was still in the future even when they were in their sixties. In contrast to this, poor health and limited mobility, lack of money, family and company and the lack of energy and confidence to take part in activities outside the home meant that for others 'old age' began earlier.

Services for Older People

For the active, confident older person with a positive outlook, life was not so very different from what it had previously been. They were not really in need of a set of services 'for the older person'. Advice and information was obtained from the usual sources of banks, solicitors, former unions or professional associations (as retired members), newspapers and increasingly, the internet. Although not mentioned explicitly on the questionnaires, there was clearly a social class factor at work which had a major effect on the experience of growing old. Good occupational pensions appeared to be very important.

In contrast to this, there was a minority of the sample who were not enjoying the benefits of a 'middle class' retirement. For a combination of reasons, including money problems, health, lack of confidence or experience of dealing with financial or legal institutions, these people were in danger of being among the socially excluded and more dependent on 'welfare' agencies such as the Citizens Advice Bureau, Age Concern, Social Services and so forth. In these situations access to advice and information was more difficult, and people in this situation could probably benefit from a specialist set of services. They were more dependent on the help of others. From comments made on the questionnaire the ideal source of help was family, and where death of a partner or children having moved to a different part of the country meant that this was not easily available, friends and neighbours became increasingly important. Membership of a church or other religious community (mentioned a lot in this sample) appeared to provide substitute support where family was not available.

Living Independently

Although varying with age as discussed above, the onset of health problems or just feeling more frail as the years passed was for most people the first negative experience of growing old. The immediate effect of this was felt in the area of routine home and garden maintenance and was mainly of nuisance rather than problem status. Being well off enough to be able to buy in people to do odd jobs was a option open to some in the sample. Having family members close by who could "pop in" was another option. For the most disadvantaged (in this context) who had neither the money nor near by family, having to do odd jobs was a constant struggle and putting them off was a growing source of anxiety.

A crucial stage in the ageing process was reached when the day to day challenges of living independently increased to such a point where living independently and alone turned a difficult situation into an unacceptable one. Once again there appeared to be no fixed point at which this happened. For one person in the sample a mobility scooter had enabled her to get around to do shopping and meet friends. For another person having no one to help administer medication was becoming a major problem. Dealing with this

crucial stage alone was far more demanding than coping with it alongside a partner, family or group of good friends.

Working for Longer

The sample, although not broadly representative, shows that a good case can be made for providing a set of services which enable older people, especially those living alone, to lead a more independent and better quality life. Their major concern was personal care. There was no strong interest in this sample for a set of services which included help with working longer. This is possibly due to the majority being over 60 and the fact that most were women who were part of a generation brought up to be housewives rather than employees. Although the sample seemed reasonably active, relatively few wished to work beyond what they considered to be 'normal' retirement age even if they could use the money. For some health was a constraining factor, but even for the energetic and active, paid employment was something that belonged to an earlier period of their lives. It is possible that the generation represented in this sample had been raised to view their late 50s or 60s as their retirement age. Social and economic change is likely to alter the expectations of later generations.

3. Designing and Developing the 50 Forward Pilot

3.1. The Initial Phase of the 50 Forward Project

Planning and negotiation of the project continued from winter 2005 to the early summer of 2006. The cabinet of Lancaster City Council made the decision on April 25 2006 that it would like to go ahead with the project. Funding initially agreed with the Department of Work and Pensions was £700,850 for a period of two years. The contract was concluded with Lancaster City Council but, as discussed above, partners were anxious to start the project and concluded that Age Concern Lancashire, a major voluntary organisation with experience of service delivery would be better able than the City Council to be the *de facto* employer of project staff.

The Steering Group for the project was established in June 2006 with a schedule for meetings at 6 weekly intervals. The project 's Programme Manager, recruited through Age Concern, did not take up her appointment until September1 2006 although the original intention had been a July 1 2006 start.

Table 8 provides a timeline for the two years of the 50 Forward Project, as we have been able to establish it. Included in the table is a parallel timeline of the activities of the Evaluation Project :

Table 8 Project Timeline: 2006 - 2008

Date	50 Forward Project timeline	Evaluation Project timeline
Winter 2005-6	Original offer from DWP and negotiations	
March - June 2006	Planning and shaping of Project	
April 25 2006	Lancaster City Council cabinet decision to proceed	
June 2006	Steering Group established as sub-group of Lancaster Older People's Partnership	
July 2006	Notional start of Project	
August 2006		
Sept 2006	Programme manager begins	
October 2006	Project launched publicly.	
October 6 2006	LinkAge Plus Memorandum of Understanding for Project	
Nov 2006		
Dec 2006		Lancaster University Dept of Continuing Education confirmed as evaluators
Jan 2007	Employment Services begins.	Training and planning starts with team of 'Volunteer Evaluators'
Feb 2007		
March 2007	Care Navigator service full	'Baseline' interviews with

	delivery begins	sample of older people in
April 2007	Volunteer Bureau begins	Lancaster and district
May 2007		
June 2007		
July 2007		Letter to 180 early clients of Employment Services/Volunteer Bureau. Request to 240 users of Employment Services/Volunteer Bureau for interview. (18 take place)
August 2007		
Sept 2007		Phase 1 Baseline report
Oct 2007		Evaluation consultant feedback meetings with three project strands and reports back to evaluation team.
Nov 2007		
Dec 2007		
Jan 2008	Jobs Fair, Morecambe Programme Manager no longer full-time and begins work with Lancashire County Council part time. Contract Manager appointed.	
Feb 2008	Volunteer Fair, Lancaster	Letter to 144 users of Care Navigator service
Mar 2008	Programme manager leaves Project. Contracts manager continues.	Interviews with small number of Care Navigator clients who had responded to letter
April 2008	Access to Information service begins	
May 2008		Draft Phase Two report
June 2008	30th June: Official end of pilot	Evaluation Consultant feeds back on draft reports with partners and feeds back to evaluation team. Interviews with further Care Navigator clients
July 2008		Questionnaire to 249 clients of Employment Services/Volunteer Bureau. 58 returned. Phone interviews with small no. of users of Access to Information service. Revised Phase Two report submitted
August 2008		
Sept 2008		Submission of draft final report.
Oct 2008		Consultant works with partners on draft report
Nov 2008		Submission of final report

The Project Steering Group, established in June 2006 to oversee the Project, was broadly based. Membership included:
     Age Concern Lancashire
     Signposts
     Lancashire County Council Social Services
     Lancaster City Council

Lancaster Older People's Partnership
Lancaster Older Person's Forum

The Steering Group's terms of reference required that "at least half "of its members "must be from organisations representing the interests of older people" and that its chair must be from one of these organisations. Interestingly the terms of reference provided for a situation in which there were unresolved issues in the discussions of the Group. They "will be referred to the Older Persons Partnership" for resolution by the budget holder, the Director of Community Development, Lancaster City Council.

In October 2006 a Memorandum of Understanding was agreed between Lancaster City Council and the Department for Work and Pensions. It was a key document and laid out the parameters of the Project. There is a three page "specification of the service "with which the Memorandum was concerned: it is well-written, clear and ambitious. It says that the "long-term aim is to build a holistic service provision for older people" in Lancaster and district. There are to be three themes "each of which can operate independently but will gain more power when their interdependencies are exploited." There is a strong assertion that "the extent to which the project succeeds is dependent on the active involvement of older people" and that involvement "is essential if services are to be sustained following the project".

Of the three themes, that of Access to Information is listed first. The service envisaged is "via a single telephone number" leading later to face- to- face "customer service centres". The specification suggests that Lancaster City Council had already made significant progress in bringing its services under a single telephone number and that it was exploring how to develop scripts and materials for operators so that callers can receive "a holistic service". This service could obviously be extended to include information from all partners and providers. The specification indicates that a customer service centre would be in existence by November 2006 and that the Linkage Plus project manager "will be based" there.

The second theme identified is "Safe and secure access to and provision of preventative services". Elsewhere this is referred to as "the Navigator role".It is assumed that navigators will be "volunteering older people" who will support other older people "on a one to one basis " for about "6 weeks with each individual". Navigators will have initial and ongoing training and will be locally based so that their knowledge and networks can be focussed. In a fairly dense description of what the navigators will do, it is proposed that, variously, they will "have a pre and post crisis role"; " a signposting role" and" a hand-holding role".

The Employment Agency (the third theme) "will be staffed primarily by older people, some on a voluntary basis" says the specification. It will work with the Jobcentre plus to develop relevant training courses and it will develop a volunteer database. It will engage local employers, even to the extent of "attracting financial contributions from them".

The specification implies that Lancaster City Council "will through a small development fund build on these three main themes" during the lifetime of the project and will consult with older people to "develop phase 2 of 'enhanced services'" (we take this last phrase to refer to the sustainability of the services once the Linkage Plus funding had ceased). (MoU 11 – 13)

The Memorandum of Understanding goes on to propose a list of six "critical success factors". They are:
1. Introduction of joint working to lead and monitor the project – the LinkAge Pilot Group
2. Delivery of locally based low level services wanted by older people
3. Proven access to employment and training opportunities for those aged 60 and over
4. Proven support from local employers for provision of opportunities for people aged 60 and over, including financial contributions from employers to assist long-term sustainability
5. Development of a volunteer network available to anybody who fits the criteria agreed by the LinkAge Pilot Group
6. Increased partnership working and practical support for LinkAge Plus principles across all sectors involved in service provision. (MoU 14).

During the summer of 2006, it had already been decided that different 50 Forward partners would take leading roles in each of the "themes" – Age Concern Lancashire for employment services, Signposts for the care navigation service and Lancaster City Council for access to information. In the months following October 2006, we understand, those working towards the establishment of the Employment and the Care Navigator services developed plans, sought contacts with other agencies and took opportunities to raise awareness of their aspect of 50 Forward. It became apparent to those leading on these two themes that each needed to appoint a Project Manager to prioritise and co-ordinate activity.

As we understand it, the development of the Access to Information service trod water and the expected customer service centre to be established in the Lancaster Town Hall in November 2006 did not happen (see section 6 below).

There was no plan to locate the themes in a single physical location and they would have different management structures. As the timeline in Table 8 above indicates, the three themes were not closely co-ordinated; they began at different times and were managed from different locations. The Access to Information service did not begin until close to the end of the project.

An ultimate project challenge, then, would be to meet the objective of integrating and making "holistic" the service to be provided by the three themes of the Fifty Forward pilot.

3.2. Interviews with Members of the 50 Forward Steering Group

Eight interviews were undertaken with members of the 50 Forward Steering Group during January and March 2007 (i.e. within six months of the signing of

the Memorandum of Understanding) as part of the 'baseline' strand of the evaluation. The purpose of these interviews was to establish the starting points for the 50 Forward initiative, for example why it was needed, what was currently in place, the gaps which needed to be filled and the general nature of the task ahead. The interviewees represented a range of backgrounds: Lancaster City Council, Lancashire County Council and the voluntary sector. Their views and experiences are presented under three headings:

- The need for 50 Forward;
- Initial development experiences;
- Progress and other success Indicators.

3.3. The Need for 50 Forward

Four types of need were identified during the interviews with members of the Steering Group.

- First, there was a growing recognition of the importance of providing support to older people with 'low level needs' who did not qualify for more intensive social service support. The main objective was to provide "that little bit of help" (to quote the title of the Joseph Rowntree Foundation 2005 Older People's Programme report) which would go a long way in keeping these older people active, safe and enjoying a good quality of life.

- There was also the need to think and act more strategically with other providers of services for older people, to communicate more effectively with one another, and to plan the delivery of their services so they fitted together in such a way that clients could move more easily between them. This was the "holistic" approach that was featured in many policy documents.

- Third, the pilot would enable them to "test out some models of working together". A number of issues were listed which could be interpreted as challenges with which the initiative would have to grapple. For example, the fact there was no unitary authority but both City and County Councils who could be deemed to have responsibilities in this area. There was also a concern that coverage in the outlying districts had to be as good as in the city itself.

- The fourth need was the economic case or as one interviewee put it "the long term aim of cutting costs". Put simply the national cost of supporting an ageing population was increasing year on year. Older people who were active, healthy and who mainly looked after themselves cost the country less. A small amount spent on supporting independent living into old age would result in a far

greater saving in terms of less demand on the health service and other parts of the welfare state.

3.4. Initial Development Experiences

As might be expected with any initiative, the early experiences of setting it up were a mixture of achievements and obstacles.

Achievements

Interviewees believed they had assembled a core of good people to plan and run the initiative. Related to this was a sense of a clear and shared philosophy which influenced the design of 50 Forward. This philosophy was available because there were a number of agencies and bodies in Lancaster who had a good grasp of the types of support older people required.

Although there was not an existing older people strategy in place when the initiative was launched, several key components of such a strategy were very quickly located and included in the development of 50 Forward. It was thought that the most important task was to blend these together into a coherent programme. Several interviewees described the first project manager as having the disposition and skills to do just this, in particular, "to carry the project around in her head".

Finally, it was also recognised that having several voluntary agencies at the centre of the strategy was absolutely essential as these had more flexible terms of reference and could move more quickly than the statutory organisations. The practical demands of establishing 50 Forward were considerable so it was important for some early pieces to be put in place with the minimum of delay.

Obstacles

A range of main obstacles were listed. The first and over-arching one was development time. It had been underestimated just how long it would take to turn 50 Forward from a plan into a set of services which were beginning to deliver. Most of the other obstacles could be included under this broad heading and contributed to it.

Interviewees attached differing amounts of importance to what they perceived to be the most crucial obstacles. However, many pointed to the fact that having to merge the systems of two local authorities, Lancaster City Council and Lancashire County Council was a particular challenge, at least at first. This in turn produced other sets of difficulties. One was simply arranging for all the right people to be in the same meeting at the same time – "it takes months to get everybody together", and another was the pace at which contracts were agreed and approved by the various sections in the councils.

The combined effect of these obstacles was to give some the sense of "time-slippage" whilst for others this was not such a huge difficulty and they believed that in the main "milestones were being reached". However, most agreed that the problem of finding suitable accommodation for the 50 Forward team and having a "shop window" for the public was particularly frustrating.

For some, the need for more development time to have been written into the Memorandum of Understanding with the Department of Work and Pensions was viewed, with hindsight, as the major obstacle, and this was having a major impact on their opinion of the early progress the initiative was making. Others were less anxious about this and thought that because a) there was not an existing strategy, and b) in view of the fact that there were two local authorities involved, progress was reasonably satisfactory.

3.5. Conclusions

During one of the interviews it was mentioned that whilst there was a substantial amount of support for 50 Forward, there was also a belief that within the constraints of a pilot it could not achieve that much. Consequently an evaluation of it should pay less attention to what it actually achieved in terms of changes to older people's lives and more to the emerging evidence about what such an approach had the potential to achieve if it was continued as an established service. Hence, what could be particularly valuable would be the experiences of the different delivery models and illustrations of how people had benefited from specific examples of help even if these were initially quite small in magnitude.

It was also explained that since the age category 50 years plus contained such a wide variety of circumstances and lifestyles it was difficult to plan for exactly what was needed. The pilot initiative, therefore, had to produce a more sharply identified and sophisticated set of needs so that resources could be targeted more effectively.

4. The Employment Services and Volunteer Bureau

4.1. Employment Services

The idea of Employment Services and a Volunteer Bureau for the over 50s was to provide the over 50 years age group with a more individual and tailor-made service when seeking employment, whether full time, part-time or in self-employment. Further, as the Memorandum of Understanding said, Employment services "will work with local employers to encourage the recruitment of older people" (MoU,13). It would also "in partnership with the local Job Centre Plus…arrange training and re-skilling courses".

Employment Services opened on the 31st January 2007. It came to be based at the White Cross offices of 50 Forward in Lancaster. The first recruitment event was an employment open day following the closure of a major employer in the city. At this event 69 people registered with Employment Services.

 Although the main target group was those aged 50 or over, as events were to prove, significant numbers of younger people were also assisted. Employers were also a target group in the sense that potentially the right people with the right skills would be matched to their vacancies. We were told that clients found out about the service from a variety of sources. As well as open days and press articles, the Job Centre Plus offices in Lancaster and Morecambe made referrals to the service.

Each client registered and was interviewed by Employment Services and from this his/her individual requirements and any training needs were identified. Employment Services then sought to offer- one to - one employment support to prepare or enable people to match their skills and abilities to any vacancies available. This service included training and workshops for CV preparation, interview techniques and mock interviews. There were also PCs available at White Cross for use for job searches.

Employment Services was active in establishing links with many employers and key players within the employment field such as Job Centre Plus, the Adult College Lancaster, the Victoria Institute at Caton; Lancaster Chamber of Commerce; and employers such as Greenwoods, HM Prison Lancaster, Heysham Power Station, and the Nat West Bank. In relationship to Employment Services, we received some interesting comments about "difficulties in establishing relationships with statutory bodies" because " there is awareness and support at strategic level where the decisions are made but it takes a long time to establish the change at the front-line where the decisions are made".

 We have no information that any employer made financial contributions to Employment services at 50 Forward, as had been anticipated in the Memorandum of Understanding. We were told that this goal was abandoned at an early stage by the Project because it was not possible "for legal reasons" and the cost of "complying with legal requirements … was

prohibitive". We have not tried to evaluate this explanation but note that the issue could have been considered at the time at which the Memorandum of Understanding (which regarded employer contributions as a matter of "long-term financial sustainability") was drawn up.

4.2. Volunteer Bureau and Time Banks

The Volunteer Bureau began its activities on the 16th April 2007 following the appointment of the Volunteer Co-ordinator.

The aim of the Volunteer Bureau was to provide support to organisations looking for volunteers to work with those over 50 years and to provide information, support and opportunities for those interested in volunteering for work with those over 50 years. Working in conjunction with Employment Services, the Volunteer Bureau aimed to provide a cohesive service to meet the needs of older people and encourage them to take active roles. But it also supported volunteers who were under 50 years in age.

Out of this set of aims grew the Time Bank service. The key aim of this service was to establish volunteering groups within communities in Lancaster and district. A Time Bank is a group of people who share their skills measured by time, one hour at a time. Time credits are deposited in a time bank and are withdrawn and spent on a whole range of skills and opportunities from other local participants.

The Volunteer Bureau was a new undertaking and the Volunteer Co-ordinator started from scratch to promote and recruit new volunteers. A Council for Voluntary Services office in Lancaster city centre had previously provided a similar type of service. However with the closure of this office a short time before the setting up of the 50 Forward Volunteer Bureau, there was a gap to be plugged.

The majority of referrals came from the promotional work and presentations that played an important role for the Volunteer Co-ordinator to help recruit volunteers. Other referrals came from Job Centre Plus or 50 Forward Employment Services to provide the long-term unemployed or "not job ready" individuals with volunteer work. The benefits for this group of people in the long term was to assist them getting back into the employment market by providing work structure and routine.

A volunteer for either the Volunteer Bureau or Time Bank service went through an interview process and completed an application form. This recorded individual skills and areas of expertise, with preferences for the type of volunteering work and the amount of time available. There was a requirement for the new volunteer to provide two referees who were not family members. Also before any volunteering or Time Bank work could start every individual had to undergo a CRB check. Following these checks a search for a volunteering placement took place using established links and contacts,

which would match the volunteer's criteria. The 50 Forward Volunteers database recorded this information.

Staff at the Volunteer Bureau said that an important part of their role was continually to establish new, and maintain existing, links with many local groups and organisations. Support for groups wishing to set up a Time Bank service and help for existing ones was an important (and, we were told, time-consuming) role for the bureau.

The October 2006 Memorandum of Understanding had said that "the Employment Agency will be staffed primarily by older people, some on a voluntary basis" (MoU,13). We do not think that this proved to be the case, although we interviewed two volunteers working in the volunteer bureau office, one of whom was over 50 years.

4.3. Evaluating the Work of the Employment Services, Volunteer Bureau and Time banks

Data for this evaluation came from five sources;

1. Information supplied by staff in the form of quarterly returns to the DWP
2. A survey of the experiences of early users (late summer 2007)
3. A follow up survey of 50 Employment Services and Volunteer Bureau users   (February 2008)
4. A survey of Employment Services and Volunteer Bureau users to study their experiences of seeking work and voluntary opportunities as an older person (July 2008)
5. A visit to a Time Bank. (March 2008)
6. Feedback from employers and other organisations working with the services. (June 2008)

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4.3.1.Information Supplied by Staff in the Form of Quarterly Returns to the DWP

The following key statistics (detailed in Table 9) show that whilst in existence:

- 102 people had been helped into employment by the employment service (of registered with the service);
- 272 people registered with the Volunteer Bureau (41% were over 50 years)
- 141 people were placed as volunteers within organisations.
- At least 59 volunteers had been recruited within two TimeBanks.

Table 9 Key Statistics: Volunteer Bureau; Time Banks; Employment Services

VOLUNTEER BUREAU (January/April 2007 -June 2008)

	Overall target	Number reached	Performance against target
Number of volunteers recruited	Target 140	Actual 272	194%
Numbers, above, are numbers 'through the door', ie people enquiring about doing voluntary placements and interviewed. 59 volunteers are also registered with the 'employment services'. 112 of the 272 (41%) clients of the volunteer bureau were over 50; showing a) the continuing demand in the Lancaster district for a generic volunteer bureau, and b) the interest by those over 50 in this kind of involvement.			
Age and Gender Breakdown of people registered with the Volunteer bureau Age range Female Male Totals 18-29 34 16 50 30-39 24 30 54 40-49 30 26 56 50-59 33 41 74 60-69 7 15 22 70-79 8 5 13 80-89 2 1 3 Unknown 2 1 3 Totals **138** **134** 272 total under 50 **88** **72** 160			
Number of volunteers placed	Target 41	Actual 141	343%
From these figures it can be seen that only 52 per cent of the people who came through the door had been placed by the last quarter that figures were available (June 2008). However this did not mean that there were 130 dissatisfied customers awaiting voluntary placements. Of the people who had not been placed: some were still awaiting uptake of references and CRB checks (which could be up to a three month process); some had found employment – either through 50 Forward or on their own; some had made alternative arrangements for volunteer work through other means; the situations of others had changed and they were no longer interested in or available for volunteer work. We were told that all 'active' volunteers – both those in placements and those awaiting placements – were called regularly by either 50 Forward staff or volunteers. Those in placements were contacted to see if they were satisfied with their placements, if they require additional support or a change of placement. Those awaiting placements were called to see if they were still interested in volunteering and to keep them informed of opportunities available.			

TIMEBANKS

	Overall target	Number reached	Performance against target
Number of volunteers recruited	Target 16	Actual 59	368%
The Timebanks project, although part of the Volunteer bureau, was not expected to reach large numbers, so targets were kept low. These numbers were exceeded by far, both in Hornby and Caton/Brookhouse. At the time of enquiry two more Timebanks were planning to come on board in rural areas, and one might develop in Lancaster City.			

EMPLOYMENT SERVICES

	Overall target	Number reached	Performance against target
Number of customers receiving training and/or into paid employment	Target 96	Actual 102	106%

Age and gender breakdown of people registered with the Employment Services			
Age range	Female	Male	Total
18-29	10	3	13
30-39	7	11	18
40-49	13	24	37
50-59	65	79	144
60-69	4	23	27
70-79		2	2
80-89			0
unknown			0
Totals	**99**	**142**	**241**
total under 50	**30**	**38**	**68**

During the period for which statistics are available there were 241 people registered with the employment service, so this represented 102 of those 241 people with 'favourable outcomes' – either placed in employment or at the least, given training in job seeking skills. Again, not all of the 139 people who had registered with the service and not appearing on the 'favourable outcomes' numbers were 'dissatisfied customers'. As mentioned above, 59 of this group were also registered with the volunteer bureau and some would have been placed in volunteering opportunities. Others were still 'actively seeking work' and hoping for support from the service.

4.3.2.   A Survey of Early Users of Employment Services and the Volunteer Bureau

In late summer 2007, the volunteer evaluators, older people themselves, gathered questionnaire data from a sample of people who were amongst the first to have made use of the Employment Services/Volunteer Bureau. 180 questionnaires were sent out to all clients of the Volunteer Bureau/Employment Services. 31 questionnaires were returned – a 19 per cent return rate - of whom our evaluators were able to contact 23 for interview.   Nine of these interviews were with men. The responses highlight five issues:

- Finding out about the Employment Services/Volunteer Bureau
- The Experience of Using the Employment/Volunteer Bureau
- Changes to Users' Lives
- The Wider Economic Value
- Other Comments

Finding Out about the Employment Services/Volunteer Bureau

The figures show that even within a relatively small sample of 23, knowledge about the service came from a variety of sources. Jobcentre Plus appeared to be the major source of information and Jobcentre staff were obviously aware of what 50 Forward had to offer in terms of employment and volunteer advice. Many of the family and friends who recommended it had some links with 50 Forward themselves which suggests that word of mouth recommendations could be a major way in which information about this kind of activity is spread throughout the community. In addition to this it is likely that those agencies which provide a service for adults will also act as gatekeepers.

The Overall Experience of Using the Employment Services/ Volunteer Bureau

The overall experiences of the users were mostly positive. Of the 23 only one would not use the service again with another one noting that a promised follow-up contact had not happened. The following brief summaries of some of the users' experiences provide an illustration of what the employment service/volunteer bureau was achieving:

- Enabled me to do voluntary work but no employment yet
- Testing out a new career idea through volunteering
- Helpful advice on starting own business
- Mainly helped with interviewing skills
- Obtained part-time work
- Wanted something very specific and they could not help me
- Not gained much – talked through situation and problems
- Not much help but useful to have someone to talk to
- Help with finding volunteer work and related training

These and other experiences suggest that whilst Employment Services and the Volunteer Bureau were making an important contribution, it was still at a fairly early stage in terms of developing its full set of services. Many of the users recognised that their circumstances, often a combination of concerns about age, health and lack of skills, would not make finding paid employment easy. Those who only wanted paid employment and were not interested in information about volunteering thought the Employment Agency could not yet meet their specific needs. Those who approached the Agency mainly as a recruitment agency were likely to be disappointed until it developed a network of employers who were particularly sympathetic to older job seekers.

Changes to Users' Lives

Of the 23 users, 20 provided information on how their lives had changed since using the Employment Services/Volunteer Bureau. No single type of change was dominant in the responses. The most notable change, mentioned by 8 respondents, was that now having a job or being in the

process of setting up a small business had enriched their lives in a number of ways; more money, self-esteem, having a structure to their day and so forth.

> "(Life) has totally changed. Trading in the next few weeks" *Male 60/69*

Three others described the changes as just feeling better about life in general. For example,

> "It makes me feel better emotionally. Great support from 50 Forward – just what I needed after being made redundant and hurting my back. I am sure I would feel a lot worse" *Female 50/59*

Another had been encouraged to join adult education courses, whilst another now had more interest in what was happening in the Lancaster area. Two thought that some small changes had taken place,

> "Marginally changed. It helps to talk to someone who knows what they are talking about" *Male 50/59*

And another two thought it was too early to tell if anything would change. For example,

> "50 Forward welcomed me with open arms but since then nothing re. employment… early days yet" *Male 50/59*

Finally, five thought their circumstances had not changed since using the bureau, but most of these appreciated that other problems they faced such as health problems did making finding work difficult.

> "I admire them for what they are trying to achieve. However I did not get what I wanted from it" *Female 40/49*

Obviously the value of 50 Forward needs to be judged by the numbers of users who report positive outcomes in the form of jobs entered, businesses started and volunteer opportunities taken up. Yet there also appear to be important if less tangible benefits which flow from the general experience of having an agency which specialises in the employment and volunteering needs of older people. In this respect the benefit was actually the process of talking through age-related issues with people who understood, were sympathetic, and who could suggest strategies for succeeding as an older person in the workforce**.**

The Wider Economic Value

Users were asked to list those outcomes of the Employment Agency and Volunteer Bureau which could be described as broadly 'economic'. 17 out of the 23 were able to identify or at least conceive of a link between using the bureau and a direct economic outcome.

The most clear of these links was obtaining a job as a result of Agency support. Eight users were now working or in the process of setting up their own business, and even if this was not the direct result of a 50 Forward referral, it was in some part due to information and encouragement from the advisers. For these eight the financial gain was obvious. They were now paying taxes and had stopped claiming benefits such as income support.

> "The benefits have to be financial even if only working part-time" *Male 50/59*

> "I was on income support for many years. Now on working tax credit and family tax credit. I pay my own rent and council tax" *Female 40/49*

A second group of 10 users were able to list a wider range of economic benefits even if their contact with the Agency had not resulted in them finding a job. These wider benefits were described by one user as improvements to "health and well-being" and the knock-on financial effects of this. For example,

> "It would reduce the number of trips to doctors. People's lifestyles would improve and so would health. It would also help people being able to help themselves" *Female 40/49*

Increased confidence appeared to be the main gain reported which had been brought about either from starting voluntary work or from the general experience of talking through personal circumstances with a member of staff.

> "It has to benefit them definitely – if only to give them their confidence back" *Male 50/59*

Such discussions helped in two inter-related ways. First, users were made to feel they still had much to contribute either to the workforce or to volunteering. Second, they were persuaded that there were some signs that some employers were beginning to recognise what an important resource the country had in its older population of workers.

Other Comments

Three categories of 'other comments' were provided. The first referred to the profile the Employment Services and Volunteer Bureau had, and the fact that steps needed to be taken to raise this profile so as to increase the number of

potential employers and job/volunteering seekers who were able to benefit from using it. (It was acknowledged that it was still at an early stage of development).

> "Employers need to be made aware of 50 Forward
> They would get good people through this system".
> *Male 50/59*

The second was concerned with the very need for such a service. It was felt there was large number of post-war children now reaching retirement age who would need to work for longer to supplement their pensions or at the very least keep active and alert through volunteering.

> "There are a lot of people coming up to retirement –
> this will be a crucial service" *Female 60/69*

Third, there were a number of comments about how the service worked, that is, its ethos and operating style. For example, one user liked the way staff at the bureau made users feel positive by tailoring their advice around the skills and talents people already had.

> "They try to build on what you have". *Female 40/49*

Whilst another valued the fact that when staff promised to keep in touch, they really did.

Thus, most of the comments made were positive and even those who had not yet obtained the type of job they wanted felt they would be worse off if they had not used it. However, there was one user who whilst recognising the importance of caring staff thought the bureau's long term success would be judged on more than giving users " just a pat on the shoulder".

Conclusions

Since age discrimination is possibly only one of several difficulties users face, it could be that this service is more likely to be effective where the user is receptive to a 'package' of ideas which each contributes something to a gradual return to work. For example, a volunteer position combined with some training and a programme of job seeking skills would provide a 'springboard' for possible future part time employment.

In addition to the more easy -to - measure economic gains such as increasing taxation and reducing claims on income support, savings were also likely to flow from changes in lifestyle which would improve physical and mental health and so lessen demands on the country's welfare services.

4.3.3. A Follow Up Study of Users of the 50 Forward Employment Services and the Volunteer Bureau (February 2008)

<u>Sample</u>

All users of the Employment Services and Volunteer Bureau were contacted by post in February 2008 and asked if they would be prepared to be interviewed by one of the Volunteer Evaluators. Although this survey was sent out to a larger sample – 240 clients had by this stage made contact with the service – responses were only received from 21 of those clients, and 18 of those people were interviewed. The 18 cannot be claimed to be a balanced or representative sample.

The interviewees were asked questions about their current position, the amount of contact they had had with 50 Forward, how useful they found the service, what would they have done without the service, and how their life had changed (if at all) following using the bureau.

The sample was made up of five males and 13 females. They fell into a range of different age groups;

Under 40	2
40-49	3
50-59	7
60-69	5
70-79	1

Five of the interviewees were under 50. Information provided to the evaluators in June 2008, of 785 users registered to both bureaux (55 of which were registered twice ie with both Employment Services and the Volunteer Bureau), shows 388, or nearly 50 per cent, were under 50.

<u>Current Position</u>

Almost all of those who were interviewed were occupied in some form of paid employment or volunteering. One now described herself as retired and another was not currently looking for work owing to illness.

Nine were in paid employment and much of this was part-time work. One was doing a mixture of paid part-time work and voluntary work. Two were now self-employed. Four were volunteering.

No single type of activity dominated the current position of respondents although four were doing administrative/office work. Others were working in a shop, a hotel, on a market stall and as a driver. One worked as a caretaker and had just begun teaching an adult education class for a few hours a week. Volunteering was undertaken in a range of settings such as a charity shop, in

a library and at a Citizens Advice Bureau. One mentioned that in addition to volunteering she was also taking a computer course.

Contact with Employment Service/Volunteer Bureau

The sample were first asked to describe the amount of contact they had with Employment Services and the Volunteer Bureau since they had first used it. Eleven confirmed that staff had made regular contact with them during the period when they were looking for advice and support. Five stated that they were contacted regularly until the time they began their paid or voluntary work and two mentioned they thought the contact from the Bureau had been infrequent.   Once in work, or placed as a volunteer, contact had stopped but most felt they would feel comfortable about using the Bureau again if the need arose.

> "I have had no contact since getting the job. But in the early days it was at least once a week. I used to talk with them over the telephone or in an interview situation or meeting up with them"

> "I had a couple of letters from them and also phone calls to see how I was progressing or with suggestions for work"

> "I have had regular contact particularly over the last 5 weeks..…Before that they were always in regular contact with me"

The Usefulness of Employment Services/Volunteer Bureau

Thirteen out of the eighteen interviewed thought that 50 Forward had played either a direct or an indirect part in them obtaining the job or volunteer placement they had obtained. Five did not think this was the case, although two of them acknowledged that the type of work for which they were looking was not easy to obtain. Direct help obviously involved bringing a vacancy to their attention and sometimes arranging an interview. Indirect help included help with CV design, interview techniques, information about training courses and qualifications and also by just providing encouragement. It also covered those situations where a voluntary placement later turned into the offer of paid employment.

Not surprisingly people thought the support that had been provided by the Employment Services and Volunteer Bureau had been useful (indeed most of these described it as very useful) whilst five did not think it had been that useful to them, although they appreciated the efforts made on their behalf.

> "They helped with my CV and improved my skills. Very useful. I got the job because of the CV and my improved skills"

"Yes they did help in the first instance to start me up by giving me useful contacts that I needed"

"In the end I did not feel that 50 Forward were very useful as I did not need them"

What They Would Have Done Without the Service

In some respects this question did require a degree of speculation on part of the respondents and their answers tended to be cautious because of this. Consequently, a valid way of categorising their responses is;

- Very probably not have made the progress they have   9
- Probably not have made the progress they have   7
- Not really helped me progress   2

"I would have been stuck without them….At 50 Forward you can talk on a one to one basis and they will listen to you. It's like a personal service."

"Very useful- they boosted my confidence when I was at an all time low. They have been very beneficial for me personally. I don't know what I would have done if they had not been around"

"I would possibly have contacted the agency in any case. But the 50 Forward helped as a backdrop to get me something"

In contrast to this, one person explained,

"I felt I managed on my own without their help"

In the light of these responses it can be concluded that almost all of the sample thought that without the service provided by the Employment Agency/Volunteer Bureau they would probably have not made so much progress towards their goal of either securing paid work or a volunteer placement.

How Life Changed As a Result of Using the Service

Fifteen of the respondents thought their life had changed for the better whilst three thought there had been no or very little change. Obtaining a job or a volunteer place was a very real improvement to their lives.

"My life has changed as I found a job"

"My life has changed definitely for the better since registering with 50 Forward. I now feel I have a path to somewhere because of what I am doing"

"Yes I was working full time and then retired. Now I have a part time job. I did need to work"

"No it is just the same it hasn't changed really"

Other Comments

All of the 18 respondents added some other comments to their questionnaires and all of these were supportive, although one person acknowledged that Employment Services had been unable to provide an introduction to the type of job that was wanted. Whilst many of the comments took the form of an expression of thanks for the help that had been provided, others were more an analysis and summary of the value of having a local agency that provided advice and support to older people.

"I would not hesitate to use them again"

"They do a great job, I may need their services again"

"Give a great degree of confidence to the older person"

In particular, it was noted how other places such as Jobcentres seemed more geared up to the needs of younger people and that those who were older, perhaps even nearing retirement age, felt awkward about using it. 50 Forward, however, because its very purpose was to cater for the needs of the older job seeker or volunteer, had a very different atmosphere. Not only were the needs of the older person understood, but staff there knew how important it was to take clients' sensitivity into account. However, the staff at 50 Forward provided more than this with many respondents noting that they had supplied them with much needed confidence and a sense of direction and purpose.

"Nobody takes you seriously when you are older and at least there is something there for the older person"

"The atmosphere at 50 Forward is very supportive"

Conclusions

The sample of 18 is small and is best viewed as an illustration of the experiences of using this service. Almost all of those who participated were satisfied with what they were provided with. Frequently obtaining a demanding full time job was not what clients were looking for. Most appeared

to be fairly satisfied with the part-time opportunities to which they were introduced and the advice which had enabled a few of them to realise a long standing ambition to become self-employed. Several enjoyed the variety of working part-time and then filling their week with a few hours volunteering.

A few of the respondents were somewhat disappointed in that they had not been able to secure the type of employment for which they were looking, although two who mentioned this were operating in a very competitive job market. Those who were prepared to use the service for advice on issues such as CV writing, training courses and volunteering as a series of steps towards paid employment appeared to be the most satisfied. This, it would appear, is the type of service that 50 Forward seemed most effective in offering.

4.3.4.   A Survey of Employment Service Users to study their experiences of seeking work as an older person (July 2008)

The purpose of this survey was to explore in more detail the experiences of those who had registered with 50 Forward and who were seeking work and/or volunteer opportunities and whether they felt their age had been a determining factor in how successful they had been in achieving this. The questionnaire was also used to discover to what extent 50 Forward had played a part in successfully helping and supporting them with any of these issues and also whether their services had proved beneficial.

The questionnaire was sent out to 249 clients aged 50 or over who had registered with the 50 Forward Employment Services and Volunteer Bureau in July 2008. 68 responses were received equating to a 28 per cent response rate. There was a higher response rate from female users of the services, with 30 questionnaires being returned from the 142 sent out to males, and 38 questionnaires being returned from the 107 sent out to females. The 50-59 age group made up nearly three quarters of the 'over 50' users of the services, although only half of the responses came from the latter group.

40% of returns came from the LA1 area which is principally the Lancaster city centre, and 20% from the LA4 postcode, the Morecambe area, both representing the two main areas of concentrated population. The rest of the responders were more or less evenly spread across the other four Lancaster postcode areas.

60% thought the experience of looking for work or volunteer opportunities had changed since becoming older with the number of responses coming equally from both men and women. Some stated that they found it a lot harder now they were getting older to find suitable posts which matched their previous experience/qualifications. There were comments made about limited vacancies on offer and the changes to application processes when applying for jobs particularly having to apply on-line. Some felt that their previous life/work experiences did not seem to count and there appeared to be an

assumption that employers were looking for younger workers. With regard to those who were looking for volunteer opportunities no apparent changes were highlighted with finding a position as an older person.

Respondents were asked whether they had experienced any age discrimination whilst looking for either work or voluntary positions. 25 of the respondents (over a third) thought age discrimination had affected them, and another 16 answered that they were not sure. That is, they could not be certain that incidents that had affected their potential employment had been age-related, but that it was possible.

They were asked whether 50 Forward had been of help with any of these issues. Over half stated that they had received help and support from 50 Forward to help resolve them. Those who felt that they had received this help were equally balanced between men and women. However, of those respondents who stated that they felt they had not received any help at all from 50 Forward (ten respondents in all) nine were men.

Finally respondents were asked what they had gained from the employment service. A high proportion of the women responders listed gaining more confidence and being given a more positive view of ageing. Men and women, in more or less equal proportions said that they had benefited help in form filling, writing CVs and helping to establish links for networking. Only a small percentage thought that 50 Forward offered no benefits and these were predominantly men. They maintained that 50 Forward could only provide limited help and did not maintain regular contact

From the questionnaire findings it is very clear a large proportion of the views and opinions submitted were favourable towards the 50 Forward Employment Services and Volunteer Bureau. However, there was a small number who did not think they gained much by registering with the employment service. The answers seem to indicate that men may have wanted something different to the women and would possibly prefer an organisation which would directly act to find then a job. The women on the other hand were quite happy with the "hand holding" approach (as it was described to us) which was inherent in the 50 Forward process. It seems to have helped many of them to gain confidence, restore self esteem to gradually help them find work.

When asked whether they sensed that their age had been a factor in unsuccessful job hunting, about one third thought it had been with two thirds thinking it had not or were not sure. There was a perception that age discrimination was prevalent in some parts of the job market but was hard to prove. Moreover, about 60% reported difficulties in dealing with modern workplace practices, particularly with changes to application processes and interview procedures. On the positive side they thought that 50 Forward had been valuable in providing them with help to prepare and compete in the modern workplace.

The main objective of the 50 Forward Employment Services was to provide assistance to the older person in finding work and it achieved this aim for

many. From the comments made, it is clear that it is delivering a valuable service for the older individual. It may prove beneficial, particularly if the 50 Forward Employment Services is to continue into the future, to establish with complete clarity from the start to any new clients what the limitations of its role are and what it can realistically provide.

There is no evidence of any age discrimination issues or negativity about the services provided by 50 Forward itself. It was apparent from the enquiries, and from the number and variety of comments expressed, just how strongly many of the people felt about their own situation and how useful 50 Forward had been to them personally.

A letter written to the volunteer bureau confirms this:
"I would like to thank you and everybody for the continuous contact and effort that's been made in helping me so far, it's not gone unappreciated".

Volunteer, F aged 54: former florist, widow. Placement in a sheltered home for the elderly

4. 3. 5.   Timebanks: A Summary

As an additional activity to the volunteer bureau (and with an eye to piloting activities that could support older people in rural areas), a pilot Time Bank scheme was set up in Hornby, supported by the 50 Forward volunteer coordinator and based in the Hornby Institute as the Hornby Village Trust Time Bank. The reception desk at Hornby Institute was manned for two hours a day. Institute staff would pass the request for help on to one of the seven Helpline coordinators, who would then contact an appropriate registered volunteer.

50 Forward's role was to follow up references and arrange CRB checks for volunteers over 16 who might be working with vulnerable adults or children. Young people under 16 (particularly where they could be supporting/helping older people) were also involved in the scheme and references were secured for them. The volunteer coordinator provided additional help, support and starter funding for the project; including the cost of stationery and the project mobile phone

The help provided by volunteers was designed not to be a substitute for any regular work that might impinge on local tradespeople and their livelihoods, but, rather, to plug gaps and to help in emergencies.

 At the time of the volunteer evaluator's visit (March 2008) 37 requests for help had been received and 40 volunteers were registered.   Examples of requests include a working couple with an elderly dog, who needed someone to exercise the dog for a short period; an elderly lady was taken to visit her husband in a care home and a wooden holder for foil and clingfilm was mounted in a kitchen.

The project was part of the Timebanks UK which aims to support the needs of the community, thus enabling people – whatever their situation - to remain fit and active and encouraging everyone to participate in their communities.

This element of 50 Forward was particularly useful in providing that 'little bit of help' which people in need may require in order to continue to live independently. The open meeting approach revealed issues where a small amount of advice had a real and general benefit – one example being the advice given to a lady who liked to organise trips. There is now a regular trip arranged for older people helping them avoid social exclusion.

Subsequently a new Timebanks scheme had been set up in Caton/Brookhouse and interest expressed in the semi-rural districts of Warton and Halton also in central Lancaster.

4.3.6. Feedback from employing organisations and organisations recruiting volunteers.

"More than just a broker…"

We talked to a range of employers and organisations who had worked in partnership in some way with the 50 Forward Employment Services and Volunteer bureau and found that the service had been seen as flexible and useful. The following 'soundbites' are taken from our interviews with these organisations and give an overview of how they viewed 50 Forward.

An HR advisor from a large paper manufacturer had not yet recruited any 50 Forward employees, but said:

"I think it's a good scheme to get people back into work and we believe in employing the best person for the job – if that person happens to be through 50 forward, ie an older person, that's great – we would look at all avenues of recruitment".

A librarian had taken several voluntary placements:

"The partnership's been very good: we were looking for volunteers for an image database. 50 Forward approached us to say they had this gentleman who wanted to work in libraries, and could we help? So I said as a matter of fact, yes we can!"

"If someone comes along to you and whatever their age, and proves they can do a good job, it's got to stand them in good stead to getting employment. Apart from anything else, it shows a willingness to get up in the morning, to still go out and do something and be interested in what's going on. These are the things I'd be looking for in library assistants, as important as academic qualifications".
    Divisional Reference Librarian, Lancashire County Libraries

A busy public park had expanded its links with the community and by doing so, has provided employment opportunities and references for its volunteers:

"We approached 50 Forward about getting volunteers; we wanted to develop as a community and volunteering centre. We had tried to get volunteers ourselves but didn't get very far; they invited us to a volunteer recruitment day and helped us to set up systems for induction. Our first volunteer is now doing paid work with us for the summer. We hope people will stay for at least an eight week block, we give them a reference if they're with us for four weeks. They tend to stay longer, doing one day a week over a longer period."

"[50 Forward are] more than just a broker: if we have any problems with our volunteers – for example if they don't turn up when they're supposed to, or if they turn up when they're not supposed to! – or if they don't fit in with the rest of the team; we can get back to 50 Forward and they'll support us."

."We've been very satisfied. It's made the difference between us having volunteers and not having volunteers: it's linked us to the community – and it's helped us with our Heritage Lottery Funding bid – we're relying on 50 Forward to be one of the partners."

"The age isn't the thing, it's the personality"
        Local Park Butterfly House manager and senior etymologist

        "

5   The Care Navigator Service

The Care Navigator Service in Lancaster was delivered by Signposts - a well established community support service based in the west end of Morecambe. In the October 2006 Memorandum of Understanding, the Care Navigator Service was introduced as " the preventative service … co-ordinated by a Co-ordinator who will develop a network of Navigators…recruited from volunteering older people who will visit, support and arrange relevant services on a one to one basis with older people" (MoU, 12)

The comprehensive Signposts web-site (www.**signposts**.org.uk) describes Care Navigator as having three levels of service. They can be summarised as follows:

> level 1: One-off information and advice. Initial assessment, telephone contact, home visit, signposting.
> level 2: Generic support. The above plus more ongoing information advice and guidance and practical support in accessing services. Referral.
> level 3: Individual support. The above plus goal planning and bespoke packages of one to one support. Case work and case reviews. Exit planning

When interviewed, staff of the Care Navigator Service described the service's aims as to reduce the isolation that was experienced by some older people and to encourage them to be more independent. This involved working with them so they felt able to join in more with social and community activities and improve their quality of live. It also involved helping them access assistance and advice which enabled them to deal with the difficulties in their lives.

When asked about the overall philosophy of the Care Navigator Service, staff described it as seeking to follow the 50 Forward principle of a holistic approach to targeted interventions where one contact with the service provided the route into a full range of available care and support. They confirmed that support from the Care Navigation Service could be provided at varying levels of intensity which reflected the degree of need. Some difficulties were eased following a home visit and a fairly brief intervention. The more severe might require regular contact with a care navigator over a period of weeks.

Staff emphasised that the aim of Care Navigators was not to provide ongoing long term support (the Memorandum of Understanding referred to "approx 6 weeks") but to help people with particular difficulties at a particular time, primarily by pointing them in the direction of available help. The aims were to provide information about existing services and how to use them (but not to duplicate them) and to assist agencies and services in combining their efforts to provide an overall support package. Thus, we were told, the Care Navigation Service sought to be the practical representation of two important 50 Forward principles; that is, timely low level intervention to prevent a

difficulty from becoming a major problem or crisis, and enhancing care and support through joined-up provision.

5. 1. Key Statistics

Service Users

Statistics derived from Care Navigator service monthly reports show that between March 2007 and the end of June 2008:

- 1053 people accessed the Care Navigator Service;
- Of these 848 accessed outreach sessions, care navigator generic visits and one to one sessions (levels 1 and 2 – see above)
- A further 205 made use of the casework care navigator service (level 3)

We understand that the nature of the project expanded during its lifetime to include people seen on outreach sessions delivered by the Care Navigator service – that is, information and advice sessions at various locations on different topics related to the initial Care Navigator brief, such as the use of smoke alarms, disabled badges, house adaptation, housing benefits, personal safety.

Volunteers

According to Signposts monitoring information, a total of 40 volunteers (of different ages, not necessarily over 50 years) were recruited and trained as Care Navigators throughout the life of the project, of whom 16 were still working with the project in June 2008. There was a regular turn-over of volunteers. They left for a range of reasons including employment and the takeup of other volunteering roles. A large number of volunteers are recruited by Signposts generally and working with Care Navigator was one of the options for them. Volunteers were CRB checked by Signposts and given generic training.

It seems that the original aspirations of the Project Pilot Group that "the preventative service" would be staffed by a "network of Navigators… recruited from volunteering older people"(MoU,12) did not fit the reality of the situation. It had been anticipated that by the final months around 50 people would be seen each month by a total of 35 - 40 volunteers. However, a functioning team of volunteer navigators of the targeted size of 35 – 40 was never achieved. Moreover, our fieldwork suggests that the "caseload" of each volunteer had to remain relatively small because of time required to support each client and each volunteer; and the overall demands of the work. Our understanding is that practicalities required that the service was run through a group of paid sessional staff who worked with the available team of volunteers and others such as student social workers on placement.

Table 10: Key Statistics: Care Navigator Service March 2007 – June 2008

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	Overall target	Number reached	Performance against target
Number of volunteers recruited and trained as CNs	Target 34 - 38	Actual 40	105% - 118%
Number of customers seen by the Care Navigator service	Target 750-900	Actual 1053	117% - 153%

5. 2. Evaluation Evidence

The data for this evaluation was obtained by interviewing a sample of eight Care Navigator staff and volunteers. We found that collecting data from users proved to be more problematic, mainly because they did not necessarily distinguish support received from the the Care Navigation Service from other means of support which they had received. A letter was sent out to 144 users of the Care Navigator service in February 2008 asking for interested people to get in touch with the evaluation team if they were willing to be interviewed or to complete a short questionnaire but this only led to six actual interviews being undertaken. Further efforts to contact users and create a sample boosted the figure up to 22 and this consisted of:

- 6 who took part in an initial interview survey with volunteer evaluators from Lancaster University:
- 5 who took part in a subsequent telephone survey with a volunteer evaluator; (these were individuals recommended by Signposts as being people who would be happy to be interviewed)
- 11 additional cases whose details were passed on in the form of cases studies or summaries of case notes.

Clearly the information from the user interviews can only be regarded as illustrative.

5. 3. Interviews with Staff and Volunteers (Spring 2008)

The Care Navigator Service was described to us as providing a place for people to turn to who are unable to be helped by Social Services or do not know where or how to start seeking assistance. Eight staff and volunteers from the Care Navigation Service were interviewed, and all felt the project was needed and fills a gap not provided by any other agency.

At the outset of the 50 Forward pilot, we were told, much initial work involved raising the profile of the service and making contacts with local groups, holding meetings and giving talks. A special effort was made to bring it to the attention of some key people who might wish to make referrals, for example, wardens of sheltered housing complexes. Time was also spent mapping provision for elderly people in the Lancaster area..

Demand for assistance from Care Navigators appears to vary according to location. For example, it was higher in Lancaster and Morecambe than it was in Carnforth. This may have been due to factors such as family and neighbourhood support, but might also have related to the different profile the service had in different localities. This variation did lead to imbalances in the service. At the time of the enquiries there were volunteers offering their assistance, and available students on placement, in Carnforth but no local referrals with whom they could work. According to Table 6 (see above), Carnforth is a district of middling deprivation for the over 60s when compared to other districts in the area.

Volunteers were described to us as "very important" to any future development of the service. Volunteers tended to be involved only for limited periods of time and volunteer for a number of reasons – to broaden experience, to improve job prospects, to give something back to the community, to keep active etc. Until they were trained and received CRB clearance, volunteers accompanied more experienced staff on visits.

Interviewees indicated that the need for assistance was varied – financial, legal, help filling in forms, and accompanying people on journeys out for those who have lost confidence. One volunteer explained how she made many enquiries about bus passes on behalf of her clients. Some people just wanted company and after initial support they were linked to 'befriending services'. On numerous occasions people needed support whilst they were recovering from medical problems. Much of the work involved making an initial assessment of need followed by a large amount of liaising with other agencies. In this respect, helping the older person make applications was an important part of the service.

It was felt that the real value of the project was that it provided home visits which enable the full nature of the issue to be discussed. Users valued these visits and the chance to receive one to one support. It also enabled Care Navigation staff to find out about the users' circumstances and suggest other forms of support.

The volunteers interviewed thought that there was a real need for the project and hoped it would continue. They noted that many of the people with whom they worked were unaware of the support and benefits to which they might be entitled. They added that without the benefit of Care Navigators their clients would have just "struggled on". Several volunteers noted how Social Services were making direct referrals to the Care Navigator Service where a client's needs did not meet the criteria for Social Service involvement. It was thought

that there would be an increasing demand by older people on the Care Navigators service for this reason.

Volunteers felt they have made a significant contribution to the project and in turn have benefited from this involvement. However, some thought the work they were doing carried a great deal of responsibility and that training and support from core staff time colleagues was essential. Volunteers who had been with the service for a longer period of time had a better understanding of the situation faced by older people who fell into the Care Navigators target group. One volunteer, for example, noted that lack of appropriate transport was a major reason for social isolation for some older people. Also a shortage of volunteers in other agencies meant that these could only provide a limited amount of help following a referral from a Care Navigator.

At the time of these enquiries, it was anticipated that referrals to the Care Navigator Service would increase as the Access to Information service based in the Lancaster Town Hall increased its activity.

5. 4. Interviews with Users (March 2008)

Evaluating the Care Navigator Service from the perspective of its users did present some difficulties because a number of them were frail and vulnerable and could not recall in precise detail what help they had received and from whom they had received it. However, in all but one case, we were told that they had received very useful support and advice and many of them explained that what they had been given had prevented their situation deteriorating to a level they would have found very difficult indeed.   The data is mainly provided in the form of illustrative case studies.

People's needs varied from case to case with some facing a particular problem such as difficulty completing forms or needing help preparing meals, to others whose problems were more wide ranging and cumulative, and often arising from a prolonged period of poor health. For example, one woman's difficulty was addressed by simply arranging for someone to visit her on a regular basis and help her with paperwork and form filling. Another woman was deemed in need of support following a visit by the Fire Service to fit a smoke alarm. A Care Navigator visited her on several occasions and helped her make an application for attendance allowance and organise visits by a nurse. The attendance allowance enabled her to use a taxi for her shopping. She explained how her life was proving difficult and "I don't know what I would have done without them (the care navigator)". She had not known where else to go to get help.

Another 70 year old lived alone in a bungalow and was referred to Social Services by her daughter who in turn passed the case over to the Care Navigator Service. Although in poor health, her quality of life became a lot better following a visit by a care navigator who arranged for a Piper Lifeline to be fitted which makes her feel far more secure. The client was unaware of such a lifeline. In addition to this the care navigator accompanied her to a coffee morning where she met several people she knew. She now attends

the coffee morning regularly.   This is a good example of two small interventions making a very significant improvement to a person's life.

Interviewees confirmed the staff and volunteer view that one of the important features of the Care Navigation Service was the home visit. Not only did this help with the initial assessment but many of the clients had difficulty accessing agencies for help. For example, one woman who mainly needed help with form filling and finances knew she could receive help from the Citizen's Advice Bureau. However, due to a combination of health issues she found travelling to places and sitting in waiting rooms difficult. Having the help provided at home was a huge advantage for her.

One of the problems faced by both clients and Care Navigators was a sense of uncertainty about what help was available and whether a particular application for help would be successful. People had heard that others in apparently similar circumstances had received help only to find that their application was not successful. One woman appreciated the Care Navigator who supported her during such an experience and described her as someone "who persevered and persevered. She went that extra mile." The client explained how the Care Navigator had "done ever such a lot for me. I don't know how I coped before. They have been marvellous"

5. 5. Referring Organisations

We are clear that the Care Navigator Service led to an expanded range of partners working together. Valuable links were forged with other organisations; the Fire Service for example, who now knew where to refer vulnerable clients they met when conducting fire safety checks, or responding to call-outs. Overall, in our enquiries we identified a feeling that different agencies, particularly statutory, providing for the needs of older people were more "joined up".   Referrals were received from a widening group of partner organisations such as the Primary Care Trust, the Intermediate Care Team, and Nurse Visitors as well as through self referrals by phone and 'over the counter.'

Referring agencies were very clear that the Care Navigator Service provided a short-term intervention. The Social Services Older Persons' Physical Disability Team, for example, usually needed to refer to organisations which provided long-term help. They assessed clients under the FACS (Fair Access to Care) criteria as either having low, medium or high need for services. Most of their clients had high need; but where the need was low or short term, they came to refer them to an agency such as the Care Navigator Service.

 A local sheltered housing scheme manager referred people to the Care Navigator Service for assistance with will-writing and supporting people with finding out what benefits they might be entitled to. A local carers' association often found people who might be lonely or isolated, and made referrals to the Service for those individuals. A Friendship Centre which ran a regular coffee morning, had been approached by the son of an elderly woman, asking for

support to take his mother to the centre. The Centre referred her to the Care Navigator Service for assistance

Several of the referring agencies mentioned the clarity of Signposts' referral form – which could be easily downloadable from the organisation's website. The organisation was flexible around administration: special arrangements had been made with the Fire Service, for example, so that fire crews could use a generic form for referrals.

Nevertheless, it does seem that the Care Navigator Service had to devote considerable effort into encouraging potential partners to engage with it. It was explained to us that while the statutory health and care agencies certainly worked with the Service from an early point, attempts to bring in other voluntary and community organisations and agencies as " delivery partners", to whose services clients could be directed, actually met with varied success. The process required more time; potential partners needed more re-assurance that they would not be overwhelmed by need or unrealistic referrals; issues of logistics and communication arose.

5. 6. Conclusions and Recommendations

Staff at Signposts who were responsible for delivering the Care Navigation Project within the 50 Forward framework and set of principles believed that there were number of significant positive outcomes associated with the project. They felt that, after more than a year's experience of the service, they had a better understanding of clients' complex needs and how to address them, and also how to manage more effectively the recruitment and retention of volunteers.

Referrals had been made to agencies such as the Handyperson scheme, Lonsdale Carers, Social Services, Piper Alarm service, and Lancaster City Council Housing Advice.

Data from the users shows that a considerable number of older people received help and had their situations improved by the help they received from a Care Navigator. Often this help has been of quite a practical and straightforward nature, but this illustrates that if an older person feels frail, vulnerable and isolated, even relatively small steps to make their situation better may be beyond their capacity and their confidence. Overall, the Care Navigation Service showed many examples of how a small amount of help from outside given at the right time can make a very large difference

6.   The Access to Information Service

The philosophy behind the Access to Information element of the project was an underpinning one for the whole ethos of LinkAge Plus. The recently published Department of Work and Pensions Working Paper on "Access to information and services for older people" (by the University of Warwick national evaluators of the eight Linkage Plus pilots – Ritters & Davis 2008) notes that the Department of Health is making funding available to 'embed the LinkAge Plus approach into their systems and cultures over the next spending period in order to deliver personalisation of services'.   They are asked to join up services in order to 'provide easy to recognise access points, which coordinate or facilitate partner organisations to meet the needs of individuals' and by 2011, councils will be expected to be providing 'universal, joined-up information and advice …for all individuals and carers,'   which, it is suggested, they could do using the 'first stop shop' model.

Most of the eight LinkAge Plus pilot projects included an element of 'access to information'.   Not all were set up as a telephone service, as the Lancaster and District 50 Forward had planned. Others linked their Access to Information Services to outreach services, community network centres, and 'Village Agents' (the Gloucestershire pilot project equivalent of 'Care Navigators'.)

In the case of the Lancaster pilot, the Access to Information telephone helpline service did not begin until the project was in its final stages, in Spring 2008. This was a major departure from the plans of the Project Pilot group. There is no doubt that the Access to Information service had been seen as a keystone of the Lancaster pilot. This is confirmed by the "specification of service" in the Memorandum of Understanding of October 2006 (see 3.3. above). The absence of this aspect of the pilot weakened its "holistic" nature and, hypothetically, reduced the volume of older people accessing the services of whole project.

The rationale for the place of an Access to Information theme in the Lancaster pilot was clear. Access to information had to be central concern because:

- there was a confusing array of information points locally which were not coordinated
- information services locally needed to be more user-friendly and of higher quality
- it was more difficult to build services without access to appropriate information
- this element complements the other two themes of the 50 Forward programme
- sustainability would depend on good access to relevant information

Of course, although the telephone helpline service did not materialise until late in the project, the ethos behind the whole of the 50 Forward pilot was to provide targeted information to older people in all kinds of circumstance. The Volunteer Bureau and Employment Service provided information on voluntary and employment opportunities; the Care Navigator service provided information on use of smoke alarms, disabled badges, house adaptation, housing benefits, personal safety, etc, to groups of older people; and specific information and ongoing support to individuals on take-up of benefits, will - writing, information on local service providers, friendship clubs etc.

 Access to Information did underpin the whole of the Lancaster Linkage Plus pilot as it developed

6.1. Establishment of the Access to Information Service

The plan from an early point in the project had been to establish a customer information service (telephone primarily but also e-mail and personal callers) operating from the Lancaster Town Hall. Plans fell far behind schedule for a number of reasons. It was explained to us that being a district council without responsibility for a Social Services Department, Lancaster had no adult information service in this area prior to the establishment of 50 Forward. Hence, there was no previous experience upon which to build the Access to Information service quickly. The importance of this had not been fully appreciated at the planning stage. Moreover, the clear plan (indicated in the Memorandum of Understanding) to base the facility within a new Customer Service Centre scheduled to be based in the Lancaster Town Hall was delayed due to a Council decision (after the start of the project) to require a review of the use of both the Lancaster and Morecambe Town Halls. This resulted in a mismatch in timing between the early need to introduce the Access to Information facility and the decision to delay the wider Lancaster City Council Customer Service Centre. Essentially, in this aspect, the 50 Forward Project came too soon and it was not able to deliver the service contracted with DWP. In the event, in February 2008, the project had to return to the DWP £123,350 of the £220,000 project grant allocated to the Access to Information theme - leaving £63,250 available. (£33,400 had already been spent earlier in the project).

A range of other difficulties cited to us in relation to the delay of the Access to Information facility included delays in appointment of key staff, staff turnover and sickness as well as technical problems in the chosen accommodation.

However, in spite of these difficulties, the Access to Information service 'went live' in April 2008 and during the first two months received over 100 enquiries. Most of the enquiries were made by phone with just a few drop-in or email contacts.   Staff involved with the service sensed it was "going really well" and the feedback they had received from users was positive. The service was widely publicised and it appeared that an advertisement in the Lancaster City Council magazine, "Your District Matters" produced the most response.

6.2. Evaluation Evidence

Evidence for the evaluation came from planning documents, interviews with the Project Manager and service staff, and a small survey of users of the service in a particular week in the summer of 2008. Key statistics derived from analysis of the first one hundred users are shown in Table 11 below.

Table 11: Access to Information: Statistics of first 100 Users, April 2008 onwards

Targets were not set for this service. However information has been collected on number of enquiries, mode of enquiry, gender, agegroup, category of enquiry, and outcome.

Of the first 100 users, 64 per cent were female, 34 per cent were male. The age range of callers was as follows:

50-55: 18%
55-60: 9%
60-65: 32%
65-70: 13%
70+ 22%
(not recorded, 6%)

Feedback provided to 50 Forward by the service provider included:

'it was good to have one number to ring for help and advice'

The enquiry types included housing (42%), Community (18%) and Health (15%) (See below for further information.)

Referrals were made from the calls to Age Concern, 50 Forward, Signposts, County services, Social Services and the City Council.

During the early part of 2008 a consultant was employed to develop and adapt IT software so that the new service was configured to link to the City Council's LAGAN network. New project staff developed information sources so that they would be ready to deal with enquiries once the service went live.

By the time the Access to Information telephone line had been operational for about two months, the Project Manager was reported to be pleased with the number of calls that had been received during that time. People had found out about the service through Bay Radio (a rather expensive advertisement with not much result); through posters and flyers in GP surgeries, libraries, day centres, church groups and various other venues; and, most successfully, through a full page spread in Lancaster City Council's magazine "Your District Matters". Calls to the service had doubled following this last advertisement. Many people had rung just to find out what the service offered and had said that they would keep the information for future reference. They were also receiving calls from people obtaining the number from the Lancaster City

Council website. It was expected that the service would be listed in the Council's A-Z listing in the local phone directory.

42% of enquiries had come from people living in their own homes who wanted information/advice about improvements/adaptations/maintenance and resulted in referrals to the City Council's Handyperson service and to volunteer gardening services. Some people requested information on approved traders which was not currently offered by the service though might be offered in the future.

Another group of enquiries was reported to have concerned community and inclusion issues e.g. activities, clubs, social groups, day centres, etc., particularly from people moving into the area. Signposts have a directory of such organisations on-line and, consequently, the Access to Information service had made use of it. Other enquiries related to volunteering opportunities and have been referred on to the 50 Forward Volunteer Bureau.

Another set of enquiries related to health and mobility issues e.g. equipment, wheelchair loan, access to health care i.e. GP's, dentists, etc., as well as sport and leisure enquiries including referrals to the City Council's Passport to Leisure scheme for its own facilities. There were two calls relating to mental health issues, one of which resulted in a section under the Mental Health Act.

Nearly all the enquiries were by phone with some face-to-face, and about 20 email enquiries. The service had mainly dealt with low level need.

As Table 11 shows, 32% of enquiries came from the 60-65 age range, 70+ being the next highest category, then 50-55 and 65-70. The oldest category in which data was collected was the 70+ category. The age group beyond 70 had not been sub-divided further, as the service had not expected many calls from this group, thinking (we were told) that calls would be made on their behalf by others. 64% of callers were female. The average length of call was 4 - 5 minutes, plus time to investigate the issue if required. There had been technical problems with the software which was providing the information; when it did not function the staff had to rely on their own knowledge, the internet and other sources.

Two staff had worked on the information line during its first two months. They answered other council calls when traffic was low, but the 50 Forward line was their priority. They dealt with phone calls, emails and face to face callers. They tried to avoid call queuing so additional calls overflowed to the main Council switchboard whose operators would take details so that the 50 Forward Access to Information Line staff could call them back.

One of the advisers said she "loved the 50 Forward work as I enjoy helping people" and felt that their knowledge of local services had expanded greatly. She also thought that callers were having a positive experience, with callers saying that they were pleased to have somewhere where they were able to obtain information on a range of services. We talked to a small number of

callers who had contacted the service in one particular week in July; and most of their responses confirmed the advisor's opinion.

The advisors had a policy of not having a 'script' for responding to calls, which the advisor was happy with as "you can't predict what enquirers will ask". While the service was not too busy the advisors spent time on obtaining more information and improving their knowledge in order to make the service increasingly responsive and useful.

The Access to Information service was not making direct referrals. We were told that this would involve completion of referral forms and setting up Service Level Agreements with the various agencies. However, the service checked with other agencies and services to obtain the correct contact number and then gave this to enquirers rather than making the referral on their behalf.

A limited Access to Information service is included in the plans for the projected continuing Help Direct Gateway provision for Lancaster so the service is expected to continue to develop.

6.3. A small survey of access to information users (July 2008)

All callers to the Access to Information service in the first week in July 2008 were asked if they would talk to one of our evaluators about the service they had received. Only four people agreed to this, so we can only report on a small sample of users of this service.

All four were female; their ages ranged from under 40 to over 70. Two got the number from friends, one from 50 Forward, and one had read about it in Your District Council Matters. One wanted to find out about services for someone with a visual impairment; one wanted help with decorating, one wanted to find out whether she was entitled to any assistance with her rent, and one was asking about the availability of NHS Dental services in the district. All four enquirers felt they had got the information they wanted, and that the person responding to them had been friendly and helpful. Two of the callers asked their initial question and then were called back by the advisor once they had found out the information they required. One caller was offered a face-to-face interview which she found very useful. One caller was transferred to several different people, but eventually found the right person and got the information she required – she was sent a list of contractors by email.

All the callers would recommend the line to others; two have already passed on the number to friends.

One caller , who was in the 60-69 age bracket, said she was a member of a generation who do not like to ask for help, and was apprehensive about making the call initially, but felt her fears were allayed by the response to her call, which was dealt with 'very professionally but with an underlying empathy'.

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6.4. Key issues for the future

On the basis of these limited enquiries with staff and users of the Fifty
Forward Access to Information service, and our awareness of comparable
services elsewhere, we believe that the following will be among the key issues
with which this embryonic service will have to deal in the future:

- keeping the database up to date;
- data protection;
- targeting the service so that it is useful to those who need it but is not
  overwhelmed by a massive number of callers
- having now started successfully, how the sustainability of the service
  can be ensured

7. – Working Together: Providing 'Joined-Up' Services for Older People

Towards the end of the pilot some members of the 50 Forward Steering Group and other key stakeholders were interviewed in order to gather their views on what they thought had been achieved and what the main lessons learned from the pilot were.

7.1. Achievements

All of the board members interviewed could point to many positive features associated with the pilot. At a general level it was thought that the different agencies had worked well together and had made considerable progress in providing a holistic set of services for older people. All valued the fact that links between agencies had been strengthened and people had been able to work with others whom they normally did not meet in their usual day to day work.

In particular, the following positive features were highlighted.

1. A sense of fulfilment due to the fact that what had been established was pioneering and represented quite a new way of providing services and support to older people. For example, previous approaches had been based on the assumption that agencies needed to identify a target group who were either experiencing major difficulties or were about to. In contrast to this, 50 Forward with its emphasis on preventative support to prolong independence meant that agencies were now working with a much broader range of people and not just the very elderly and the frail.

2. One of the reasons why partnership working had been so successful was the sense of equality which existed between the partners. This meant that no single organisation dominated 50 Forward with the other partners reduced to a minor role of just making partial contributions. 50 Forward had become a separate brand and was not seen as a "council service" or an "Age Concern Lancashire" service. It had gone a long way to transforming the notion of 'holistic working' into practice because people took responsibility for referring clients on when their needs fell outside the normal remit of the particular service they provided. There was a shared sense of responsibility to generate the holistic approach. A good example of this was the 'home visit' undertaken by a wide range of people working for the Care Navigation Service, the Fire and Rescue Service and so forth. Based on observations made during such a visit, staff would refer the client's need on to another agency who could provide additional support.   This was widely felt to be much more prevalent in the district than it had been before the establishment of the 50 Forward pilot, because there were arrangements in place to facilitate it.

3. In addition to those fully involved with 50 Forward who were immersed in its philosophy and approach, the message about the value of a small amount of preventative work had been absorbed by other professionals who were not directly involved with the pilot. That is, being constantly aware that small

changes in the way they worked or indeed just checking with older people if they needed anything more, could have enormous benefits in terms of preventing small difficulties escalating into more major ones.

4. The pilot had also gone some distance towards encouraging older people to think of growing older in more positive ways. A good example of this was the Employment Services and Volunteer Bureau. Whereas it would immediately interest those older people who were already positive towards working or volunteering in the later years of their lives, word of mouth recommendations and its growing profile would bring the option of working or volunteering to the attention of a wider range of older people and the staff of agencies who worked with them. Consequently, staff supporting an older person in a domestic matter might now suggest volunteering as a way of making their life more fulfilling. This was something that was much less likely to happen before this pilot.

5. Deliberate steps had been taken to involve older people living in more isolated communities outside of Lancaster to benefit from 50 Forward. Volunteering activities and the Timebanks scheme were provided as examples of the way this had been achieved. Accessibility to services had become a major concern of 50 Forward, and it was believed that the needs of those living in the villages and other small communities surrounding Lancaster now had a higher profile as a result of the pilot.

7.2. Lessons Learned

Interviewees thought that many of the lessons learned during the pilot had arisen from difficulties which had been anticipated and identified at an early stage and could probably not have been avoided during the pilot. In fact some thought the Lancaster pilot had been initiated by the DWP partly to test out developing LinkAge Plus in an area where there were two local authorities involved. The main lessons learned were:

1. The timescale of two years was thought to have been too short to develop fully and put into operation the 50 Forward programme. All strands of the programme felt under pressure and it had not been possible to launch the Access to Information helpline in sufficient time for it to make a substantial impact or to allow the whole project to develop on three fronts as envisaged. Where 50 Forward strands were based on previous experience, such as the link between the Care Navigation Service and earlier work undertaken by Signposts, the time constraints proved less of a problem. Part of the problem was the time it took for items to pass through the decision making processes of Lancaster City Council and the fact that this council had no prior responsibility for older people's services. One lesson was the value of being able to use partners from the voluntary sector to issue employment contracts in less time than it would a local authority.

2. Coupled to the first point was a sense of having too many possibilities to aim for within too short a period of time. Various partners noted that the amount of funds which were potentially at their disposal could not be fully

utilised in the time that was available. This created a tension because whereas people knew what was possible from a financial point of view, they also knew that it would be difficult to achieve all that was desirable in the time available and with the pace of decision making. Again lessons learned from the Access to Information delay were put forward to illustrate this point.

3.   Some partners felt that a suitable base should have been obtained prior to the establishment of the 50 Forward project.   Finding suitable accommodation for project staff had been a difficulty and this had a negative effect on the pilot. There had been a sense of geographical fragmentation with different strands operating in different places. There were also practical difficulties associated with gathering people together at the same time and actually finding premises where meetings could take place.

In spite of the difficulties listed above, those interviewed during this phase of the evaluation were very satisfied with what had been achieved during the 50 Forward pilot. One summed up the project by describing it as "very successful and reached more people than we originally intended to". Another added "I think it's exceeded my expectations". A third added that in addition to what had been provided to older people during the pilot, the lessons learned had been "hugely influential in the design of Helpdirect Gateway in Lancashire"

7.3. Critical Success Factors

It is important to review the original Critical Success Factors noted at the beginning of the report and taken from the Project's Memorandum of Understanding written in October 2006:

1. Introduction of joint working to lead and monitor the project – the LinkAge Pilot Group
2. Delivery of locally based low level services wanted by older people
3. Proven access to employment and training opportunities for those aged 60 and over
4. Proven support from local employers for provision of opportunities for people aged 60 and over, including financial contributions from employers to assist long-term sustainability
5. Development of a volunteer network available to anybody who fits the criteria agreed by the LinkAge Pilot Group
6. Increased partnership working and practical support for LinkAge Plus principles across all sectors involved in service provision.

An analysis of project progress against these factors is presented Table 12 following, in grid form.

:

Table 12(a): Progress of Project against Critical Success Factors

Original Critical Success Factors	Data available	Comment
Introduction of joint working to lead and monitor the project – the LinkAge Pilot Group	Regular meetings and minutes of 50 Forward board; interviews with members	All members of the board were complimentary about partnership work – appreciating working between the City and County councils, the Third Sector organisations, the voluntary groups, and with representation from the DWP LinkAge Plus funders at most meetings, felt they had the ear of national government throughout the project.
Overwhelmingly mentioned by Board members as two outstanding elements of the project were the Chair of the Programme Board, and the Fifty Forward Programme Manager. Both were well informed, fully engaged, and respected by all who worked with them. The Chair had a background in public health and had been involved in very relevant research and development projects. An 'older person' herself, she lives in a rural part of the district and is engaged in local politics. .		
Delivery of locally based low level services wanted by older people	Monitoring information	Increasing use of Care Navigator service, Volunteer Bureau and Employment Services
Proven access to employment and training opportunities for those aged 60 and over	Monitoring information	The larger proportion - 144 – or 60% - of the 241 users of the Employment Services were aged in the 50-59 age group, However 29 individuals aged 60+ (16%) were registered with the service. Of 134 users of the *volunteer bureau,* 38 (28%)were aged 60+.
Proven support from local employers for provision of opportunities for people aged 60 and over, including financial contributions from employers to assist long-term sustainability	Monitoring information, feedback from employers	Partnerships with local companies who have provided stalls at employment fairs; sent vacancies to 50 Forward Employment Services, etc. Financial contributions have not been forthcoming. Sustainability is still being actively explored for the employment services
Development of a volunteer network available to anybody who fits the criteria agreed by the LinkAge Pilot Group	Monitoring information; information, information from project staff	"Volunteer network"should be interpreted as development and utilisation of register (s) of volunteers willing and able to support older people. The project

		achieved this aim.
Increased partnership working and practical support for LinkAge Plus principles across all sectors involved in service provision.	Feedback from partner organisations	As well as the original project partners, additional partners have been recruited to play a major part in 50 Forward in terms of referrals, delivery of service and communications.

The October 2006 Memorandum of Understanding also contained a table of "what Lancaster 50 Forward aims to achieve". The table is, in fact, labelled "Achievement and indicator target ranges".(MoU, 14). It is an interesting table because it was written at a time when the Pilot Group probably had no idea of the complexities ahead but felt confident enough to propose actual numerical targets for the work in front of them. The targets seem, in retrospect, reasonable and it is possible to say that the most significant of them (but depending partly upon definition of terms) were achieved. Table 12 (b) extracts and updates some of these "indicator target ranges".

12(b) Project achievement against indicator target ranges

Indicator	Target range	Achievement June 08
Care Navigator: Total navigators recruited and trained	34-38	40
Care Navigator: Total customers	75-900	1053
Customers to training and employment	70-96	102
Volunteer network ("available to anyone who fits…Linkage Plus criteria")	35-41	312
Local employer support: Sign-up	8-10	Certainly "employer support". Depends on definition of "sign-up"
Local employer support: Financial contributions	5-9	None

7.4. Links across the three strands of the pilot

Although the three strands of the project were set up and managed as one pilot, there was always a potential problem linking three geographically separate strands of one project. The Volunteer Bureau and Employment Services, which were co-located in the White Cross offices in Lancaster along with the Programme Manager and, after she left, the Contracts Manager for the whole pilot, maintained excellent links and continually worked together, cross-referencing clients and passing people from one service to another. Around ten per cent of clients were registered with both services.   The Care

Navigator service was based in Morecambe at Signposts, a long-established and well-known voluntary sector service with shop-front offices; and the Access to Information service, when established, was based at Lancaster Town Hall.

Despite their geographic distance, the three strands of the project were able to work together in many ways, although the three different start dates of the strands made it difficult to maximise opportunities. Access to Information used information provided by the other strands and was able to provide information to the other strands and also to refer callers to them, where appropriate. The Volunteer Bureau provided volunteers for Signposts. The role and skills base of the Care Navigator volunteer was particularly demanding and in fact no Care Navigator volunteers came through 50 Forward Volunteer Bureau, though volunteers worked on other aspects of Signposts' work. Signposts was able to inform the Employment Services of their employment vacancies, and was able to refer people to the Volunteer Bureau and Employment Services. Finally, as mentioned above, the Volunteer Bureau and Employment Services were symbiotically linked and have formed an integral and innovative partnership. We would strongly recommend that one important lesson learned from this project is that the co-location of Employment Services and a Volunteer Bureau can lead to many exciting and unexpected spinoffs and particularly useful opportunities for older people.

7.5. Necessary Support for volunteers

The project's Memorandum of Understanding laid considerable emphasis upon the key role which volunteers would play in the project, particularly in the Care Navigator service, and it mentioned specifically volunteers over the age of 50 years. As has been shown, Signposts as an organisation is successful at recruiting volunteers and it achieved the target number for the 50 Forward Care Navigator service. Nevertheless, there was a regular turnover of volunteers in the service and few remained in place throughout the whole period of delivery.

One project partner talked about the amount of support that is necessary if volunteers are to be used at any level within a project.

"Volunteering is not a cheap option. In order to empower them to deliver the service, you need to put a lot of effort into that. It's very time consuming. We only have a small team. We've done well, the volunteers have been fantastic but it's quite demanding. You need to put a lot of effort into training, supervision and ongoing support. That needs to be built into any model that would have volunteer involvement as part of it."
Manager, Third Sector organization

This issue was also raised at a meeting in the late Spring of 2008 which brought together older people acting as volunteer evaluators or researchers within three of the teams carrying out the local evaluations for the national LinkAge Plus projects. This meeting, organized by Lancaster's evaluation

team from the Department of Continuing Education, Lancaster University, was designed to foreground the role that older people can play in evaluating projects designed to improve services for older people.   The volunteers and managers met separately; and the conclusions from that meeting were very similar. Some of the essential elements in volunteer management which came out of that meeting were:

- The importance of initial interviewing and taking up of references
- putting in the time to build up familiarity and trust with people
- the value of consistent ongoing support from staff
- the opportunity to keep going over the aims and purposes of the work in different settings until the volunteers feel confident and happy with them
- the need for reassurance for people who are engaging in an unfamiliar task
- maintaining training and support throughout the process
- ensuring that expenses for travel and phonecalls, etc, are covered with minimum bureaucracy
- making the process fun as well as useful: providing lunch, teas and coffees, including time for people to get to know each other and the project team as well as doing the work.

During the lifetime of the project, some training in volunteer management was offered at the 50 Forward premises and this was attended by some of the organizational partners who had taken volunteers referred from the Volunteer Bureau. This was welcomed by those who had participated, though one organization said that a shorter course – maybe over a couple of days rather than a few weeks – would have been more accessible for their busy staff team.

7.6. Intra- and external communications

The website that Signposts had set up for the 50 Forward Care Navigator element was particularly praised by one referring partner: it was very clear and had downloadable referral forms.

However there was no 50 Forward web 'presence' designed for the overall project, so there was no 'online' place for the general public to gain information in one place about the different strands of the project or for services for older people in the Lancaster district.

In addition, although *managers* from the three strands met through the 50 Forward board, the operational staff were not in continual communication with each other. One of the other LinkAge Plus projects, the Leeds project, had a regular project *newsletter* which went some way to help with intra-project links and communications, and something like this this might been a useful communications tool for all 50 Forwards staff, whether employed or voluntary.

It could have been circulated by email, with hard copies made available for those who did not have access to the internet.

7.7. Sustainability

Part way through the life of the project, the Programme Manager of 50 Forward was recruited by Lancashire County Council's Adult and Community Services Directorate as a Development and Commissioning Officer in their Wellbeing Department. She had partial responsibility for the design and development of 'Help Direct Gateways' in Lancashire – which were put out to tender in early 2008. Successful providers were expected to put in place a team to provide a range of services for at least a three year period, working in partnership with the Borough, District and City councils; the three Primary Care Trusts and the Police and Fire and Rescue services. Services were to include:
- reaching out to those people most in need of some support and helping them to access practical support;
- providing information and advice about helpful practical support services to all adults, including basic screening of needs, benefit checks and a follow-up check to see if the problem has been resolved;
- providing pathways to employment through volunteering opportunities;
- signposting people to statutory services (LCC 2008)
The design of these services, which are to be delivered by a range of different providers across different districts of Lancashire, was based very much on the LinkAge Plus/50 Forward model.   The contract for Lancaster district has been won by Age Concern Lancashire and we understand that it is planned that there will be some continuity with the Volunteer Bureau, Information Service and Care Navigator Project.

We understand that additional bridging resource has been obtained which will allow for the continuity of the Employment Services for a shorter period, perhaps giving an opportunity for the partners on the Board to access further funding to sustain the service further.

This is welcome news, This evaluation project provides ample evidence that the three strands of 50 Forward should continue.

7.8. Unexpected spinoffs

At least two sets of additional group activity have started due to the work of 50 Forward:

The Eyes and Ears Group

50 Forward 'Eyes and Ears group' was a small group of older volunteers, who were connected with the Forum for Older People's Services. Their role was to liaise between the Forum for Older People's Services and 50 Forward; and to comment on the responsiveness and usefulness of the service to the 50 Forward staff.   Speakers from the different strands of the project had reported

on their work to the Eyes and Ears group so the group felt fully informed as to the work of the project. One member of the group had included information about the project in her local village newsletter and felt they were in touch with a wider audience who otherwise would not have heard of 50 Forward. Members of the group had assisted with registration at public events such as the Volunteering and Employment events.   They did not have a specific volunteering role but were, instead, asked to provide an overview of the project and act, literally, as its 'Eyes and Ears'. Like members of the volunteer evaluator group, the participants of the Eyes and Ears group had had responsible jobs in relevant areas prior to retirement. One member said "*Being a member of the group gave me a lot of personal satisfaction; I like to be involved in community affairs'.*

Senempower

Through the connection with the project evaluation team, the County Council and Age Concern Lancashire have, in partnership with the Department of Continuing Education at Lancaster University, been involved in a European Union project, SENENPOWER, funded through the Grundtvig stream, which provides training for carers to improve their own caring practice, and to help other carers over the barriers of accessing services. 50 Forward is being used to identify people to participate in one strand of the UK part of the programme. The project brings together carers in six European countries; and if this pilot training programme proves successful, it may be the basis for future work across Lancashire.

7.9. Project Costs and Value for Money

Project Costs

Table 13 below contains our best knowledge of project costs

Table 13 Claimed expenditure against budget: whole project+

Expenditure type	Initial Budget (MUA) ?early Oct 2006)	Revised budget(1) ?early 2007	Revised budget(2) Feb2008	Claimed Spend 06/07	Claimed Spend 07/08	Claimed Spend 08/09	Overall Project Total Claimed Spend
Project management	44500	93180	93180	24782	68623	11747	105152
Administration & Project Support	20000	55241	55241*	4978	40174	10785	55937
Accommodation	0	35000	35000	0	35000	0	35000
Evaluation	50000	50000	50000	15000	30000	5000	50000
Employment & Volunteer Services	146050	140230	149524 *	8681	106940	43504	159125
Care Navigator	218800	140700	140700	40200	80400	20100	140700
Access to Information	221500	186500	63250	0	31750	21510	53260**
Total	700850	700850	577600	93641	392887	112646	599174

+ Numbers rounded to nearest £
** Underspend of £ 9990 transferred to Administration & Project Support* (£ 697) and
Employment & Volunteer services* (£9294) – in ?2008

Expenditure figures are those claimed from DWP. The revisions to the budget
show the history and evolution of the project. The original budget, attached to
the October 2006 Memorandum of Understanding, reflects the original plans
and aspirations of the Steering Group/ Project Board. Access to Information is
the largest proposed head of expenditure; the sum budgeted for project
management and administration is relatively small and nothing is allocated for
accommodation.

A Revised Budget (1) - which we deduce must have been approved by DWP
in early 2007 – shows significant changes due to the early experience of the
project. The budget for Care Navigator was reduced by £78,100 (36%). The
reason given was "late start in delivery and unexpected costs led to
reforecast". The Access to Information budget was reduced by £35,000 (16%)
because of "delayed start and planning due to changes in council and
awaiting cabinet decision". The sum of £35,000 was introduced into the
budget "due to planned accommodation for the programme falling through
and delays to Customer Service Centre…[requiring that]new accommodation
had to be found". The sum for project management was increased by 109% to
£93,180 because of "re-profiling to accommodate recruitment of programme

manager for life of pilot". The amount for administration and project support was similarly increased by 176% to £55,241.

The failure to begin the Access to Information service led to a major adjustment to the project budget – we believe in February 2008. The Board evidently agreed with DWP to reduce the overall project budget from £700,850 to £577,000, a reduction of £122,980 (- 17.5%). Within the project budget, the whole of this reduction was attributed to the Access to Information sub-budget- leaving it with a notional £63,250 It is worth observing that this reduction had the effect of making the cost of the Lancaster 50 Forwards project to be no more than about 60% of the cost of some of the other Linkage Plus pilot projects (cf Table 1).

The Access to Information service eventually began a few months before project closure. The final column in Table 13 shows that £53,260 was claimed as expenditure on this buget line over the project life. An underspend of £9,990 was transferred to administration and project support and and Employment and Volunteer services. The figures available to us of project final claimed expenditure appear to show overspends on project management (£11972) and Employment &Volunteer Services (£9601). The final project expenditure claim appears to have been £599,174.

Table 14(a) below shows our calculation, in terms of the figures available to us, of the balance between administration, delivery and evaluation in claimed project expenditure. 59% of total expenditure was spent on delivery, defined broadly (and probably including further administration, planning and design as well as implementation costs (cf Table 16). Table 14(b) shows the changes in budget allocations between the three broad categories of expenditure which led up to this final distribution

Table 14 (a) Broad categories of claimed expenditure: whole project +

	£K	%
Project administration	196089	33
Delivery (cost of 3 strands)	353085	59
Evaluation	50000	8
Total	599174	

+ Rounded number

Table 14 (b) Changes in balance of broad categories of project expenditure during lifetime of project

	Initial budget-MUA Oct. 2006	Revised Budget (1) ? early 2007	Revised Budget (2) Feb 2008	Overall Project Claimed Expenditure June 2008
	%	%	%	%
Project administration	9	26	32	33
Delivery (cost of 3 strands)	84	67	61	59
Evaluation	6	6	8	8

Table 15 highlights the main shifts in patterns of expenditure during the lifetime of the project in more detail. It takes as base the revision to the MoU budget, which we date as probably early 2007 on the grounds that this budget represented the Steering Group's intentions, once they had come to grips with some of the practical difficulties which they were facing. It can be seen that by the end of the project only 29% of the money intended for Access to Information services was actually spent in that area. Project management and Employment and Volunteer services each spent about 13% in excess of the base budget. The Care Navigator service and the Evaluation project spent to budget and the administration and project support head was close to base budget.

Table 15 Variance from Revised Budget(1): whole project

Expenditure type	Revised Budget (1) ? early 2007 (£)	Overall Project Claimed Expenditure June 2008	% variance
Project management	93180	105152	+ 12.84
Administration & Project Support	55241	55937	+ 1.25
Accommodation	35000	35000	0
Evaluation	50000	50000	0
Employment & Volunteer Services	140230	159125	+ 13.47
Care Navigator	140700	140700	0
Access to Information	186500	53260**	- 71.44
Total	700850	599174	- 14.5

Of historical and possibly indicative interest is Table 16 (a) below. It is derived from the financial planning table which is part of the Memorandum of Understanding agreed with DWP in October 2006. Table 16 is an edited summary version of that table.

Table 16 (a) MoU Financial Plan, Oct 06: Projected expenditure on key activities

Financial Plan headings	£
Programme management	**44500**
Administrative support	**20000**
Evaluation	**50000**
Improving Access to Information	**221500**
Design and development	*56000*
Implementation	*123000*
Enhanced services	*42500*
Preventative Services	**218800**
Design and development	*54500*
Implementation	*121800*
Enhanced services	*42500*
Employment Agency	**146050**
Design and development	*54000*
Implementation	*88050*
Enhanced services	*4000*
TOTAL	**700850**

Thus, of the amount to be spent on the three strands (and note that, at this early stage, the Care Navigator strand was described as "Preventative Services") - £586,350 – the financial plan was that £164,500 (28%) would be spent on design and development , £332,850 (57%) on implementation and £89,000 (15%) on enhanced services

But how was "implementation " understood? Table 16(b) summarises the further information which the MoU financial plan provides.

Table 16 (b) MoU Financial Plan, Oct 06: Projected expenditure on implementation

Financial plan headings for Implementation	£
Improving Access to Information	*123000*
Initial & ongoing training (2 part-time trainers, training materials, expenses)	39000
Staff (2)	79000
Volunteer staff costs (eg expenses)	5000
Preventative Services	*121800*
Initial & ongoing training (1 part time trainer, training materials, expenses)	35000
Staff (I co-ordinator, 1 admin. support, expenses, meetings)	63000
Volunteer staff costs (eg expenses)	23800
Employment Agency	*88050*
Initial & ongoing training (training materials, expenses)	7000
Staff (I leader, 1 deputy leader,1 admin. support, expenses, meetings)	76500
Volunteer staff costs (eg expenses)	1750
Services (eg contribution to skills training for older people)	2800
TOTAL	*332850*

We have no comparable data on actual detailed project expenditure over the project lifetime. Therefore, we cannot relate the financial plans for expenditure on design and development, implementation and enhanced sevices with actual spend in those areas. To do so would have been useful, if only to demonstrate the evolution of this pilot project from original plans and aspirations to achievement.

Value For Money

A recent DWP report written by the Linkage Plus national evaluators at the University of Warwick on making a business case for LinkAge Plus emphasises the difficulty of estimating the actual cost of each referral or service. After reviewing early evidence from the eight pilots, it concludes:

> "Collecting unit costs has proved difficult, and other studies have encountered similar difficulties. … we have been able to calculate the unit costs of some LinkAge activities [but] we would caution against making simple comparisons of unit costs between different examples as they represent very differing forms of service delivery. In Gateshead, 'Link up in Gateshead' costs £4.45 per contact. In Gloucestershire, referrals to services by Village Agents cost £120 each. In Lancaster, the Care Navigator service costs £176. In Nottinghamshire, recent costs for their First Contact scheme are £24

per referral. In Salford, the Housing Choice service costs around £286 per referral. Lastly, in Tower Hamlets, outreach contacts cost £124 per contact." (Watt et al, 2007 p3)

The reference to the Care Navigator service in the Lancaster pilot is based on data collected in the first half of 2007.

This caution over the calculation and use of quantified unit costs is well founded, A simple "contact" or "referral" to the Employment and Volunteer and Care Navigator services in the 50 Forward pilot might have resulted in nothing more than the provision of a straightforward piece of information but could have led to a life-changing intervention. So to count all "contacts" or "referrals" together ignores the differences between them. On the other hand, such quantifications are available, as are undifferentiated data on the costs of services, and can provide broad indicators or, at least, hints of where further investigation could take usefully take place.

Table 17(a) is a simple accumulation of quantitative data available from the Employment and Volunteer and the Care Navigator services for the lifetime of the project.

Table 17 (a)Care Navigator and Employment and Volunteer Services: cost of contacts

	Cost of Service £	Total Contacts/ Clients/ Participants	Contacts/Clients/ Participants over 50 years	Cost per contact etc(£)	Cost per contact etc over 50 years(£)
Care Navigator	140700	1053	1053++	134	134
Employment Services	79563+	241	173	330	460
Volunteer Services & Time Banks	79563+	272 + 59 = 331	112*	240	710
TOTALS	299825	1566**	1338	191	224

* details not known for time banks
** 59 individuals registered with both Employment and Volunteer services
+ cost of Employment services and Volunteer services assumed, on advice, each to be half of total
++ extrapolation from Care Navigator monitoring statistics June 2008

In Table 17(a) the footnotes on missing data and on the assumptions made in reaching the calculations should be taken into account. As far as we can tell, all (or almost all) of the Care Navigator contacts were 50 + years. This was not so for the Employment and Volunteer services. Therefore, Table 17(a) shows that the cost of each Care Navigator contact aged 50+ was £134; for the Employment service the comparable figure on the data available to us was £460; for the Volunteer service it was £710 .

The average cost of contacts aged 50+ across all of these project services was £224.

Can we go further than these very broad - brush calculations on contacts? Table 17(b) attempts to do so with only partial success and it does have missing information on clients aged 50+ years. It can be seen that Table 17(b) assimilates the data available on clients placed in employment or training by the Employment service, clients for whom volunteer opportunities have been secured by the Volunteer service and clients of the Care Navigator service who were recorded as having been given the information, contact or referral which they needed. The latter category is evidently a less precise category than the two former and the data is extrapolated from a sample. For the Employment service the cost per client placed could be calculated as £780 and for the Volunteer service £564. The cost calculated for each contact of the Care Navigator service which was recorded as having been successful was £148. We do not have differentiated cost data for the Care Navigator Service which would be needed to evaluate, for example, the costs of a level 3 (casework) service for the 205 older people for whom it was provided.

Table 17 (b) Care Navigator and Employment and Volunteer Services: cost of placements and referrals

	Cost of Service £	Total contacts placed/ referred/ given information	Cost per contact etc(£)	Total contacts placed/ referred/ given information over 50 years	Cost per contact etc over 50 years(£)
Care Navigator	140700	951*	148	951**	148
Employment Services	79563+	102	780	Not available	Not available
Volunteer Services	79563+	141	564	Not available	Not available
TOTALS	299825	1194	251	Not available	Not available

* extrapolation from 11% sample of Care Navigator statistics
++ extrapolation from Care Navigator monitoring statistics June 2008
+ cost of Employment services and Volunteer services assumed, on advice, each to be half of total

What can be done with these calculations of "value"? The DWP working paper from the University of Warwick, quoted earlier, argues that such costs need to be placed in a comparative cost framework derived from the Linkage Plus philosophy. That is to say, it should be tested how the costs of the "preventative" interventions and services promoted or made available by the Linkage Plus pilots to older people who are active and independent in the community have saved, or limited, other expenditure through delaying decline

into dependence, illness or need of acute services. Thus, into this framework should be placed money saved by, for example, decreased and delayed referrals to hospital; numbers of people moving from receiving benefits into employment and therefore, additionally, paying taxes; fewer visits to medical services as individuals regain confidence and independence; fewer call-outs from the fire service as individuals have fire alarms and safer housing; allowing people to stay in their own homes for longer, thereby saving money on residential care homes.

There are considerable methodological problems in making deductions of value from such a framework. Unless the evidence from each individual older person is going to be evaluated quantified and assimilated, there have to be elements of assumption and common-sense ("it couldn't be otherwise") in any judgements of value made. The Linkage Plus national evaluators from the University of Warwick imply in DWP working paper 42 (Watt et al 2007) that the costs of Linkage Plus projects can be regarded as relatively minor if the causal link between their outcomes and a reduction or postponement of older people moving into high dependency, hospitalisation or permanent residential care can be established. The report argues that "reducing the rate of institutionalisation of older people by one per cent per year could save £3.8 billion and … reducing age-specific dependency rates by one per cent would reduce public expenditure by £940 million by 2031" (op cit, p14). It quotes an IdeA study of the Rushcliffe (Nottinghamshire) First Contact Scheme. This study reports that the cost of a First Contact scheme referral was £28.57 and that the cost of a hip fracture was £25,425. Thus, if First Contact succeeds in preventing a hip fracture for 0.112 % of its referrals it is cost-effective.

The DWP report also uses a study from the Office of the Deputy Prime Minister to suggest that the saving *per annum* of postponing the movement of older people from a particular form of supported dependency in the community into long – term residential care as being £462 . It suggests that if would be reasonable to suppose that Linkage Plus projects had achieved this postponement for at least 5% of their contacts. Thus, in the case of the Lancaster 50+ Care Navigator service the saving would be at least £23,631 per year at the threshold of 5% of clients. However, as the Warwick authors of the DWP report reflect, "drawing inferences from such calculations is hazardous" (op cit, p14)
.
Within the evaluation of the 50 Forward Lancaster pilot we were interested in the success of Employment Services in placing clients into employment or training and wondered if this success could be assessed against value for money criteria. Table 18 below shows our attempt to do this .

Table 18 Calculation of weeks of individual employment after which 50F Employment Service shows profit: tax revenue and pension credits*

20%	April 2008		Cost of 50 Forward Employment service	79,563	
£5.52	Minimum wage from Oct 2007		Number into employment	102	
£124.05	Pension credit guaranteed income per week from April 2008		Cost per person into employment	£ 780.03	

(a) Calculation of weeks needed to recoup costs through tax due

Hrs worked	Gross Pay	Tax due	Net Pay		Weeks to recoup costs
5	£27.60	£5.52	£22.08		141
10	£55.20	£11.04	£44.16		71
15	£82.80	£16.56	£66.24		47
20	£110.40	£22.08	£88.32		35
25	£138.00	£27.60	£110.40		28

(b)Calculation of weeks needed to recoup costs through savings on pension credits

Hrs worked	Gross pay	Net pay	Pension Credit reduction		Weeks to recoup costs
5	£27.60	£27.60	£2.60		300
10	£55.20	£55.20	£30.20		26
15	£82.80	£82.80	£57.80		13
20	£110.40	£110.40	£85.40		9
24	£132.48	£132.48	£107.48		7
25	£138.00	£138.00	£113.00		7

*We are indebted to Lynda Pickering for the ideas and data which made this table possible

Table 18 works from the cost per client placed in employment or training and calculates the recovery time for that cost through tax paid while in employment or pension credit payments foregone. Thus, in the case of the Fifty Forward Employment Service, the cost per client is calculated as £780.03. If a client is employed for 25 hours per week at the April 08 minimum wage level, the sum of £780,03 can be deemed to have been recovered within 28 weeks. Similarly, costs of pension credit guaranteed income equate with £780.03 within seven weeks of employment for the same number of weekly hours.

Table 18 may be judged to make a *prima facie* case that the Lancaster 50 Forward Employment service was good value for money. Obviously, saying that requires assumptions to be made both about missing data and about likely behaviour of individuals (e.g. period of time staying in employment; number of weekly hours worked). But the assumptions can be relatively conservative and a "common-sense" approach to a value for money judgement confirms a positive conclusion.

7.10. General Conclusions and Evaluation Summary

At the start of this evaluation a view expressed by several on the Steering Group of 50 Forward was that the project was a two year pilot whose main value was to provide practical experience of developing a set of support services for older people within the framework of the LinkAge Plus philosophy and approach. They cautioned against the view that the 50 Forward pilot would produce, in the time available, a substantial amount of positive outcomes related to changes in people's lives. They thought a number of older people would benefit from it, but believed that the prime purpose of the pilot was to trial the LinkAge Plus approach and learn from the process of doing so. The key would be to test the potential of the LinkAge Plus philosophy

This report shows clearly the large volume of achievements of the Lancaster 50 Forward project often against the odds and sometimes from a standing start. Table 12 above measures the project against its own stated "critical success factors". The report admits frankly that some things went wrong, or at least, were not as expected. All three strands took time to be prepared and set up and the Access to Information strand was only operational a few months before the project ended. The management structure of the project and of its strands evolved and adjusted with experience. There were difficulties inherent in Lancaster City Council's lack of prior involvement in care provision. There were no financial contributions secured from employers (as originally hoped for). It had not been anticipated that employment services would expend significant resource on clients under the age of 50 years; and difficulties in recruiting and retaining volunteers had been greater than expected (for example in Care Navigator).

How, then, can we measure the Lancaster 50 Forward project against LInkAge Plus philosophy and criteria? We make the attempt below, drawing

deliberately and transparently on the LinkAge Plus published criteria (see section 1), and adopt the device of referring to system-related, development-related and person-related criteria

System – related criteria

1. To build a robust evidence base to support the case for joined- up services in terms of delivering better outcomes for older people.

We can say that the 50 Forward project made a firm contribution to the building of such an evidence base. With its outcomes, it has demonstrated the effectiveness of organisations coming together for a common goal in a co-operative rather than a competitive manner and in an open environment. Participating organisations have all seen benefits within their own organisations. There is plenty of qualitative evidence that, in spite of the frustrations along the way, most have appreciated the openness and honesty between services and have achieved a greater understanding of the constraints within which others operate. This has led to imaginative ways of dealing with potential problems such as the length of time it would take a district Council to recruit a project manager or to allocate existing staff to a new low-priority service. Similarly those who could not do things because of their own operating framework either found ways to make a positive contribution or produced ideas for alternative actions.

2. To build an evidence base that supports the economic case for fully joined up/holistic services for older people.

We cannot claim that the project has accumulated enough quantitative data to make an economic or business case for joined-up services. However, we do think that section 7.9 above contains some interesting indicators. Moreover, the report shows that some of what may be lasting benefits would have been lost without the initial investment made. Investment of smaller *per capita* resources earlier in the lives of older people rather than expenditure *per capita* on a much greater scale later, when critical intervention is necessary, seems to be the approach justified by this project. There are certainly indications that small interventions with older people at an early stage (of the nature introduced in this project) against a backdrop of holistic working have the potential to reduce or delay ultimate demands for more intensive services. At the very least, they divert the demands on statutory services for responses which can be handled elsewhere

3. To test the limits of holistic working.

The project has shown that holistic working needs an appropriate facilitating environment in order to work fully. It needs to be more than an aspiration or a set of rhetorical phrases. In Lancaster, the City Council had not been a care provider and had not had a high priority for work with older people. However, it began the pilot with a positive intent to work with other agencies within a co-operative framework. Time was needed for holistic

working to develop successfully. And a two year funding horizon was therefore not enough. A proper development would need some expectations of sustainability into the future

4. *To build a body of good practice and lessons learned for other partnerships and communities thereby encouraging wider application of the approach, beyond pilot sites.*

Each of the three strands of the 50 Forward project has generated good practice and creative ideas (evidenced in this report) worth following up and disseminating. The unintended discontinuities between the strands have been as instructive as the successful relationships. Both quantitative and qualitative evidence in this report shows that the three strands have had successful outcomes as well as unexpected spin-offs which merit further examination, dissemination and emulation.

Development-related criteria

5.*Volunteers or paid 'mentors' who support vulnerable people to access and negotiate their way around available services*

The use of volunteers in the Care Navigator service proved to be essential to its successful outcomes in supporting older people in finding their way around available services. The phenomenon of time banks of volunteers (of all ages) developed in the Employment Services/Volunteer Bureau strand was a useful example of a local volunteer arrangement which could be stimulated and supported. There are clearly issues around the utilisation of volunteers relating to recruitment, preparation and retention and about how a service that has a high reliance on volunteers can be made viable. This is an area of experience in which the 50 Forward project could provide a service, by disseminating its experience, to those organisations contemplating similar services.

6. *involving older people in the design of the services*

This has been a strength of the 50 Forward project. Older people were prominent and significant in the original planning of the project and formally the Forum for the Older Person and the Lancaster Older People' Partnership Board have been influential voices on the Project Steering Group, and have shared in the steering of the project throughout the period. It is not unimportant that older people have shared in designing this evaluation and in carrying it out.

The recent 2008 DWP working paper (authored from the University of Warwick), which bases itself on information derived selectively from the eight pilots, puts the "Linkage Plus approach "on this criterion in relatively strong terms - "the approach of putting the needs of older people first, as they themselves perceive it, at the forefront of provision is a good basis for improving services" (DWP, 2008,p16). As far as we know, the DWP

working paper does not draw upon the Lancaster evidence on this issue. We believe that, if it did, it could make the claim even more strongly

In general the whole project has changed the way service providers in Lancaster and district view the involvement of older people in policy and service development. The principle that they should be involved and consulted and the contribution which they can make recognised is unlikely to be forgotten or ignored by the City Council or any of the participants in the future. Indeed, during the most active period of the Lancaster 50 Forward project, Lancaster City Council with the Local Strategic Partnership was engaged in a formal and systematic consultation on the re-shaping of the Community Strategy, which would provide an input into the decision-making process of the Council and provide a direction for the Local Strategic Partnership in the short to medium term future. ..The Fifty Forward project, as well as most of the local organisations and services concerned with older people made significant representations of their views during the consultation. As a result, one of twenty strategic priorities in the Strategic Plan focuses on older people. It reads:

> to "enable older people within Lancaster district to continue to contribute to all aspects of life, both economic and social, and to receive appropriate support when needed" (Lancaster and District Local Strategic Partnership, 2008)

7. outreach activity to take services out to people who would not otherwise access services they need

The principle of outreach activity in the context of services with older people is clear. Not all older people with low-level needs will have the confidence or knowledge to seek available information or assistance which, in effect, will prevent a smaller issue turning into a larger one at a later date. Indeed, not all older people may perceive that there is information or assistance available that can improve their quality of life and/or prolong their period of independence. Outreach activity can be focused upon a particular issue but open doors to many others. The Care Navigator service in 50 Forward showed this to be the case. In the period for which data was available. 1053 clients accessed its services and all of these contacts were generated through one form of outreach or another.
We do not, however, have data on the degree of success of the project in outreaching to older people in the outlying areas of Lancaster and district

8. 'drop in' type resource centres providing a single access point to multiple services

Drop in resource centres, providing one-stop access to multiple services for older people, were not a part of the design of the 50 Forward Project. However, the philosophy behind them of the "one-stop shop" very much permeated the activities of the project's three strands. The successes of the project now confirm that it would be very much counter-intuitive not to design future projects without such an approach as a foundation principle.

9. an aspiration for 'no-door to be the wrong door' for access to the range of services required by an individual.

As in the previous response, with the "no door to be the wrong door" principle" operative in the project, there was an immediate gain for older people, particularly the more vulnerable. No longer did they have find out what they needed and then seek out a solution to their immediate problem before going through the same process for the next one. With 50 Forward (for example, in the Care Navigator service) they could tell one person all their issues and needs (however low-level) and work through them consecutively or concurrently.

Person-related criteria

10. quality of life improvements for older people

The baseline survey undertaken by the 50 Forward project showed that there are several types of 'old age' experienced by people in the Lancaster and district area. Those with a reasonable income and possessing the knowledge of how to obtain maximum benefit from the services and support available tend to approach getting older in a reasonably positive state of mind. In contrast to this, other people experience old age as a period of financial problems, growing concerns about their ability to cope with day to day demands and an increasing sense of social isolation and exclusion.

The 50 Forward pilot was able to help older people in a number of ways. For example, those who were enjoying good health and who wanted to maintain an active lifestyle were provided with an employment and volunteer service which helped them feel they were still able to make a contribution. Those whose lives were more difficult were helped to alleviate some of these difficulties by receiving practical and emotional support through the Care Navigation Service.

Of course, we cannot claim that 50 Forward could solve some of the major difficulties which older people faced. The Employment Service was unlikely to help an older person obtain a job if s/he had not been able to obtain one in earlier life; nor would any agency prevent people feeling lonely following a bereavement or loss of contact with children or grand children. However, within the parameters of what an external support programme could do, there is much evidence in this evaluation which shows that a small amount of preventative support can make a very worthwhile difference to older people's lives. This main message can now be used to shape the development of the further support services for older people which need to be sustained now that the 50 Forward pilot has finished.

11. improved well-being and independence

The qualitative evidence gathered by the 'volunteer evaluators' of 50 Forward' speaks consistently to the general satisfaction of users of 50 Forward services and to the (admittedly subjective) accounts given by them of improvements to feelings of well-being and new independence in

achieving individually defined goals. The quantitative evidence is also striking. Taking the three strands of the project (but with only restricted data from Access to Information), and counting only those users/clients who were known to be 50 years or older, 1426 older people were registered with, or assisted by, the project in the periods for which we have data.

What the project appears to have shown is that services for older people should not only be for those with critical high-level needs. There is a massive need for the local, low-level, "little bit of help" services which can assist the many older people who are located between independence and dependence. Such services can also secure that the independent older person remains longer so. The project suggests that there is no one model for provision of such services, nor is there a need for a predetermined view on whether it should be professionals, volunteers or a mix delivering them. The experience of the project suggests that the financial investment in such "intermediate" service delivery need not be large but that what is invested could reduce larger service expenditure later in an older person's life span. The prospects are genuinely positive; the key to success will be whether the kind of "partnership" approach enjoyed by the project can be generated in all communities. For the tax-payer it is an "all win-no loss option".

The success of the Employment Services in 50 Forward (102 having received training and/or moved into employment) has provided a valuable lesson for those involved in policy-making. A relatively small investment here will contribute significantly to the long-term culture change of keeping people in work for longer. The qualitative data appears to reinforce the view that the type of work and the hours worked may be different from those in younger life. It may be that later life/ career changes are no less significant and difficult for the older individual than changing and developing career choices are in earlier life

12. accessibility and efficiency.

All three strands of 50 Forward exceeded quantitative expectations of client use (although the delayed Access to Information service had no formal targets.). This suggests that the models of delivery adopted were both accessible and efficient. In its different strands the project piloted face- to-face, telephone, e-mail, website, one-to-one and group-based forms of communication, information- giving and identification of need. It used professionals, volunteers and even students to deliver its services. All of these means and media have their place and are complementary although it is clear that most development, and probably most benefit for individuals, was associated with the face-to-face discussion or visit. We were told " for a high percentage, they just want a face to talk to. .. We understand things better when we can see the person giving the explanation".

7.11 Key Outcomes

Commenting on the outcomes of the 2007-8 consultation leading to the new Lancaster and District Local Strategic Plan, one of the project partners, interviewed by an evaluation fieldworker, observed that a key outcome was that since 2006, older people have had a "louder voice on the district stage". Instead of being seen only as recipients of health and social care, they are now, we were told, seen as an asset and a positive force when it comes to volunteering, employment, and contributing to decision-making. It was reasonable, said the interviewee, to conclude that the Lancaster 50 Forward Linkage Plus project, and all of the publicity, discussions, negotiations and adjustments surrounded it, contributed importantly to the emergence of this "louder voice" .

The same informant added, reflecting on the 50 Forward Project,:

> *"The three strands have surpassed expectations and proved that with the right prompts a project like this can prove that the whole is greater than the sum of its parts"*.

If we attempt to summarise, then, the key outcomes of the Lancaster 50 Forward project, which have contributed to such a positive summative appraisal, and which this evaluation has documented, we can say that:

- a project of this nature can be carried out in a District Council which has not had responsibility for caring services for older people and can, in fact, benefit positively from the absence of pre-established lines of responsibility, working practice, patterns of communication and precedent.

- an employment service for older people can be established *ab initio* and function effectively in a project of this nature and can make important positive differences to older people's lives and opportunities

- the principles of the care navigator service - a non- crisis, time-limited, low-level information and support service - can promote independence of older people in the community and improve their quality of life in a significantly cost-effective manner

- basing a project such as this on expressed needs of older people and giving representatives of older people a significant role, and decision-making powers, in the project makes success and relevance much more likely and demonstrates the value of going beyond mere rhetoric on this point.

- there will be a lasting project legacy in the District of positive attitudes on the contribution of older people to society and of the recognition of the need to consult older people on the provision of services which

affect them and to encourage their involvement in related decision-making.

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