age UK
Improving later life

Are you listening?

A booklet produced for statutory bodies on the effective engagement of older people

Acknowledgements

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1 Introduction

We are reminded daily by the media of our rapidly ageing population and the pressures that this is already putting on local services. Difficult decisions are having to be made by local authorities and the health economy about facilities and service priorities. Older people have a wealth of experience and expertise which they are eager to contribute to help find solutions.

Older people's forums – which will subsequently be referred to as forums in this document – can be a useful engagement tool. Age UK and its local partners work with a network of independent forums through a programme called Speaking Up for Our Age. If you are not already in touch with your local forum, please make contact with the Civic Engagement Officer within the Age UK Engagement and Volunteering team and we will be pleased to put you in touch. Call 0800 169 80 80 or email engagement@ageuk.org.uk

While accumulating legislation demands that local people are involved in the planning and delivery of local services, this policy is backed by a growing body of evidence, which shows that engagement is effective in delivering cost-effective, useful services.[1]

This is a good time for commissioners and providers of services to explore new ways to involve service users and potential service users in identifying priorities and opportunities for the reconfiguration of services.

This publication aims to support local authorities and the health economy with their decision-making by explaining how they can engage with older people on the design and delivery of local services. As local citizens, older people wish to be informed and engaged on all local matters, not just on those that are assumed to be of interest, such as health and social care.

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2 What is engagement?

Civic Engagement, which is the focus of this booklet, has been defined as 'collective actions designed to identify and address issues of public concern'.[2]

The terms 'involvement', 'participation' and 'engagement' tend to be used interchangeably and will be used thus in this document. The different levels of involving people are demonstrated by Sherry R. Arnstein's community engagement 'ladder of participation'[3] in which lower 'rungs' mean less participation and higher rungs equate to more participation.

Arnstein considered the lower rungs, of informing, consulting, involving and collaborating as 'tokenism' because the power-holders still retain rights to decision-making. It is not until the higher rungs of 'partnership', 'delegated power' and 'citizen control' that citizens gain increasing degrees of real power and clout.

2.1 Informing, consulting, involving, collaborating, partnership, delegated power, citizen control

Different types of involvement are appropriate in different situations, but the aim should be to strive for maximum engagement. Genuine engagement works best as a continuous process rather than a one-off event. With this in mind, forums provide a valuable and cost-effective foundation for local civic engagement.

citizen control

delegated power

partnership

collaborating

involving

consulting

informing

Case study: A view of the Wiltshire model

Just over four years ago, Wiltshire was almost at the bottom of the national league regarding engagement with older people. Senior citizens were determined to change this and as a result, out of a small think-tank, a research programme was born called Beyond the Immediate (BTI). The Wiltshire Strategic Board gave its full support to this.

BTI has been an extraordinary example of how working together can really make things happen if everyone is committed to a shared aim. Over 50 agencies came together to form the alliance, led by Age UK Wiltshire. The over-50s themselves played a key role in finding out about the needs, concerns and aspirations of their peers. This was supported with funding, time, energy and practical help from statutory bodies and alliance members.

When Wiltshire became a unitary council, service users, alongside others in the third sector, worked in close partnership with the council to make more effective use of scarce resources.

This was achieved by developing good practices around engagement, aimed at the improvement of services offered by the council, and by involving the third sector in providing more local services.

Service users have been invited to be directly engaged in the policy-making decisions in many practical ways. Membership of key boards, such as the Joint Commissioning Boards on Care and Health, Older People Services, Adult Abuse Board and the key Scrutiny Board, has brought about substantial benefits.

There is also ongoing engagement with older people at grassroots level through the establishment and development of 18 Area Boards, each with a reasonable budget to decide on local improvements, as well as through annual events.

3 Why engage?

Wiltshire County Council is confident of the benefits that a structured engagement policy has enabled.

Successful engagement takes time, money and practical resources, so statutory bodies and service providers will want to be clear about the reasons for engagement. These include:

• government legislation requirements
• strengthening understanding between policy-makers, planners, commissioners, service providers and service users
• improving people's later life
• making better use of resources.

3.1 Government legislation

As this publication goes to press, there is considerable uncertainty about the future obligations around engagement that will be required of local authorities and service providers. What is absolutely clear, however, is that there is a growing expectation for local authorities and service providers to have robust and demonstrable engagement strategies in place. These will be fundamental to the effective local implementation of the localism agenda and the Big Society.

3.2 Strengthening understanding between policy-makers, planners, commissioners, service providers and service users

Forums tell us about the confidence that effective engagement with statutory bodies and service providers brings. When older people are engaged in decision-making, they are more easily able to understand the reasons for cuts and are eager to work with commissioners to find effective solutions that meet local needs. Building understanding and trust in this way paves the way for fruitful open discussions.

Case study: Portsmouth municipal budget-making

In Portsmouth, the City Council invites Portsmouth Pensioners' Association (PPA) together with other voluntary bodies, including the local Age UK, to a consultation meeting on a draft budget every January. PPA then meets to discuss and makes representations as a deputation (five minutes) at the full council meeting when the budget is agreed. This is an important process because once the budget has been agreed, the scope for further interventions later in the year over cuts, for example, may be futile. Following the budget, the PPA asks one of the city financial officers to give them a breakdown of all the expenditure on older people for the coming year.

3.3 Improving people's later life

It is neither acceptable nor feasible to make assumptions about older people's opinions and needs. Today's older people are extremely heterogeneous, encompassing people with radically different life experiences and a wide age span of 40 years or more. This huge range of difference is a challenge for planners, which can most effectively be addressed by involving people from across its spectrum.

As is illustrated in the case study below, older people have valuable contributions to make in ensuring that local needs are met through cost-effective, high-quality services.

Case study: Engaging people in the Dorset POPP programme

Dorset County Council and Dorset NHS jointly fund the Dorset Partnership for Older People Programme (POPP). Older people are engaged at every level of the programme and have seats on the POPP board, which provides governance for the scheme. Older people were involved in the selection and appointment of staff (manager and community development workers [CDWs]). They are also involved in commissioning from independent providers to manage the POPP Leadership and Wayfinder parts of the programme. The Leadership and Wayfinder posts offer part-time paid employment and many of these posts are filled by people aged over 50.

Older people, working in partnership with the 17 forums for the over-50s across Dorset and the Dorset Age Partnership, identify needs within their localities. With the help of the POPP CDWs and supported by POPP leaders, the older people make applications for funds to the POPP Exchange Group, which allocates funds of up to £2,000 to start local projects. For example, many areas identified the lack of transport.

This identification then led to the development of voluntary car schemes that provide transport to GPs, hospitals, shopping trips and social activities. Other examples of local projects include lunch clubs, table tennis clubs, exercise and craft groups, for example. These projects are organised and run by older people who volunteer their services. Older people make up the majority of members on the exchange group. Each application for funds is scrutinised and must demonstrate sustainability before approval. The older people of Dorset have also contributed to developing a set of outcomes against which all activities are measured. Andrew Archibald, Head of Adult Services at the Dorset County Council, says: 'The POPP programme would not have been possible or as successful had it not been for the very positive partnership with older people, which has grown up over a number of years. Working closely in the way we do means that we can continue to develop community-based initiatives and ideas which contribute to people's health and wellbeing, and which make a real difference to their lives.'

The National Development Team for inclusion (NDTi), an independent organisation, is commissioned to evaluate the Dorset POPP. The evaluation demonstrates how people experience fulfilment by making a positive contribution in participating in these activities.

3.4 Efficient use of resources and budgets

By engaging with older people, local authorities can provide the most appropriate services with the finite resources at their disposal. There are a number of areas where it has been proven that good engagement is cost-effective:

1 Engagement helps to target services to where they will have greatest impact, as demonstrated in the Dorset POPPs work outlined above.

2 Older people who are engaged in making a decision are more likely to actively support its implementation and will strive to make it work. This will often produce tangible savings in the resources dedicated to that service.

3 Local authorities have found that engaging older people in the planning of services and policies has helped to 'future-proof' services so that they take into account future needs. This is being achieved, for example, in Knowsley through an active older people's forum, which is driving the vision and strategy for older people in the area and is supported by an involvement officer who is funded by the local authority.

4 Planning engagement

4.1 An engagement strategy

The case study above demonstrates the value of establishing an engagement strategy through which organisations, such as forums, are supported financially and linked into existing planning structures. An engagement strategy can usefully be underpinned by policies and procedures for reimbursing expenses, evaluating engagement activities, feeding back, and so on, which together create a clear and robust commitment to engagement.

Where forums do not exist, or do not represent the breadth of the older community, the engagement strategy should ensure that the diversity of the local older population is represented, including traditionally excluded older people such as black and minority ethnic older people, older gay men and lesbians, or disabled older people.

Many local authorities involve forum representatives on their older people's planning boards and similar committees, and recognise the need to involve several representatives. Forums are eager to ensure that they have representation in the new local structures currently being established.

Where representation from a group is sought, elections will need to be resourced, as will the processes of representing a range of views and feeding back.

4.2 Resourcing

Successful engagement clearly requires investment of time and resources. But the benefits have been widely recognised. For example, in Weston-super-Mare, forum members were asked to write down details of broken paving slabs on postcards that they sent to the local authority, thereby saving the authority the cost of looking for broken pavements themselves. By mending its pavements, the local authority reduced the number of falls and compensation claims.

In addition, in Eastleigh, a forum undertook a survey on housing needs that proved a valuable tool for the housing officer in producing the council's housing strategy.[4]

Case study: How older people influence decision-making at all levels in East Sussex

There are seven seniors' forums in East Sussex with a countywide umbrella group – East Sussex Seniors Association (ESSA). ESSA and each of the seven forums receive a grant from East Sussex County Council (ESCC) for running costs. ESSA has a main committee and two theme groups: health and community care and transport and environment. These are the areas that were considered a priority by older people. The theme groups are an effective engagement mechanism for entering into a dialogue with senior officers from the county council.

East Sussex County Council (ESCC) has produced a strategy called the Time of Our Lives that promotes the wellbeing of older people. It covers eight quality of life areas that were identified as the main priorities for older people. The strategy has been developed with the active involvement of older people. There are also three representatives from ESSA on the Older People's Partnership Board (OPPB) and Improving Life Chances Board (ILCB) respectively. These boards are multi-agency and oversee the strategic planning and commissioning of health, social care and housing support services.

Keith Hinkley, Director of Adult Social Care, says that this strong involvement of older people was achieved by gaining agreement among councillors that this was the right approach.

Keith says: 'East Sussex has a large population of older people and councillors were very committed to ensuring that their voice was heard. This is having a huge impact on all of the council's activity. There has been a cultural change as the expectation on the quality of engagement has changed. Older people really do have an influential voice.'

In addition to getting political sign-off, there are two other important elements. It is important that older people have evidence of how what they have said has influenced decisions and what is needed and why. There must be transparency in how older people have influenced decisions. It is also important to be very well organised and structured, with a strategy, plan and targets. Older people must be part of the process that monitors whether or not targets are being met and must help to deliver them. The model used in East Sussex needed a lot of initial investment in time and money but the result is that the priorities of the council better reflect what the local community says is important to them. Hinkley adds: 'Councillors really appreciate that we have a network of 10,000 older people who are willing to share their views about services. Once established, the network needs little more than some administration and an infrastructure that supports engagement.'

4.3 Planning a consultation

Forums welcome the opportunity to discuss how a consultation or collaboration could work. Above all, they value involvement right from the start in order to prevent misunderstandings later on. Early discussions with forums, other organisations and individuals, who come from a range of backgrounds and have diverse perspectives and experiences, are invaluable for exploring the fundamental issues. These discussions enable understanding and trust to be built between organisations, and also make clear the aims and goals of the consultation to everyone. Setting the boundaries of the discussion, and outlining what can be changed and what can't, ensures that consultees go into the process with realistic expectations.

Some councils have developed a policy on the reimbursement of people's time and expenses in supporting the work of the council. Such a policy should take into account the needs of diverse communities and may include the costs of speakers of other languages, as well as carer costs.

See East Sussex County Council's Supporting People Service User Involvement policy.[5]

4.4 Reaching your audience

All people in later life should have the opportunity to become engaged in local authorities' and health service providers' decision-making, so a wide range of media and contacts need to be used, including:

- local community magazines, newspapers, radio stations, websites
- libraries, post offices, bookmakers, surgeries, hospital waiting rooms, bus stations and buses, shops, pubs, churches, notice boards and launderettes.
- social workers, service providers, district nurses, day centres
- local voluntary organisations, community groups and places of worship.

Newsletters are an important way to communicate because many older people do not have computers. For those who do, Facebook and Twitter are increasingly used.

4.5 Promoting equality and inclusive practice

Demonstrating a clear commitment to advancing equality and developing genuinely inclusive practice is critical for local authorities as well as for forums. Thought and resources need to be invested to engage those older people who are often excluded and whose voices are least likely to be heard. A clear strategy also needs to be developed to put this into practice. These excluded older people may be carers, care home residents or people from black and minority ethnic communities, including travellers and gypsies. They may be lesbian, gay or bisexual, or socially isolated men. They may also be people who are physically unable to get to meetings, or who feel intimidated or too unwell to attend meetings.

People from these diverse groups will often have issues and concerns which are shared by the majority of older people. However, they will also have specific needs. Their views and contributions can be invaluable in helping to design services that are welcoming to, and appropriate and inclusive for, older people from diverse backgrounds and with a range of needs – and not just those from a particular section of the community.

Day centres, community centres, coffee shops, tea dance classes, faith centres and community groups can be very good places to start when trying to reach out to people who are often excluded. The benefits of developing genuinely inclusive practice in engaging with older people are usually well worth the investment involved, for all those concerned.

It can sometimes be worthwhile to involve community leaders, among others, who already have the trust of older people in their community. Again, it is vital to involve them right from the start. Sometimes innovative outreach and communications methods are needed – for example, having a market stall or approaching people in shopping centres, or through places of worship, to get their views on an issue.

Thinking about who you're trying to reach and going to the places where they go can be a basic, but important, starting point.

The Hillingdon BME Elders Forum, supported by the local Age UK, provides an important 'half-way house' for Black and Minority Ethnic (BME) older people to be able to get their views and voices heard and fed in to the general borough-wide Assembly, in which the overwhelming majority of participants are from white communities.

Case study: Rotherham Borough Council's 'Home from Home' quality scheme

Age UK Rotherham has supported the implementation of Rotherham Borough Council's 'Home from Home' quality scheme by running sessions in residential homes to support residents and their families in expressing their views about the care they are receiving.

Questionnaires are another way of gathering people's views.

Top tips for gathering people's views

- Pilot questionnaires first with a broad selection of older people to see if the questions are intelligible, relevant and acceptable.
- Include a freepost address.
- Make hard copy and email versions, and consider making any printed materials, including questionnaires, available in different formats or languages. Also ensure that people know how to obtain them.
- Consider short questionnaires as they are most likely to get a sizeable response.
- Allow space for people to write their comments and plan how these will be included in the analysis of responses.
- Expect to pay the full mailing costs if mailing out through a local group.
- Include questionnaires in local newspapers and newsletters in order to reach more people.

Local councils often hold databases of people (for example, holders of the 60+ bus pass) and, within the confines of data protection, these existing resources can be a useful route for involving older people.

Interviews can be useful, although finding people who are prepared to be interviewed may be challenging and time-consuming. Where there are safeguarding and mental capacity issues, interviews in people's homes should always have an intermediary present who is well known to the person and who has been CRB-checked. Another option is telephone interviews. In these cases careful planning is needed, to ensure that the interviewee understands the nature of the call.

4.6 Arranging meetings

Forums advise that it is helpful for participants to receive about six weeks' notice to attend a consultation meeting.

Bad experiences of previous engagement activities can be an unfortunate barrier to persuading people to come to consultation events. Meetings may need to accommodate the needs of a wide range of people, many of whom may have little understanding of the topic under discussion, or of how your organisation works.

Involving key organisations, such as forums, in planning your event from the start will ensure their assistance in preparing and circulating publicity, helping on the day and encouraging their members to attend.

Your local forum will be able to advise on key matters, such as choosing suitable, accessible venues; dates; times of day; and ways of encouraging good attendance. A welcoming, friendly and fun aspect to the event will relax people and ensure positive feedback.

Being able to meet people's basic needs, such as making transport easy, providing car parking, setting an appropriate room temperature, ensuring that people are able to hear what is being said and to see and understand what is written, providing comfortable seating, meeting people's dietary needs, and ensuring the close proximity of loos and adequate comfort breaks, all contribute to a positive outcome.

Specific needs that may need to be accommodated include wheelchairs, guide dogs, interpreters, carers and signers.

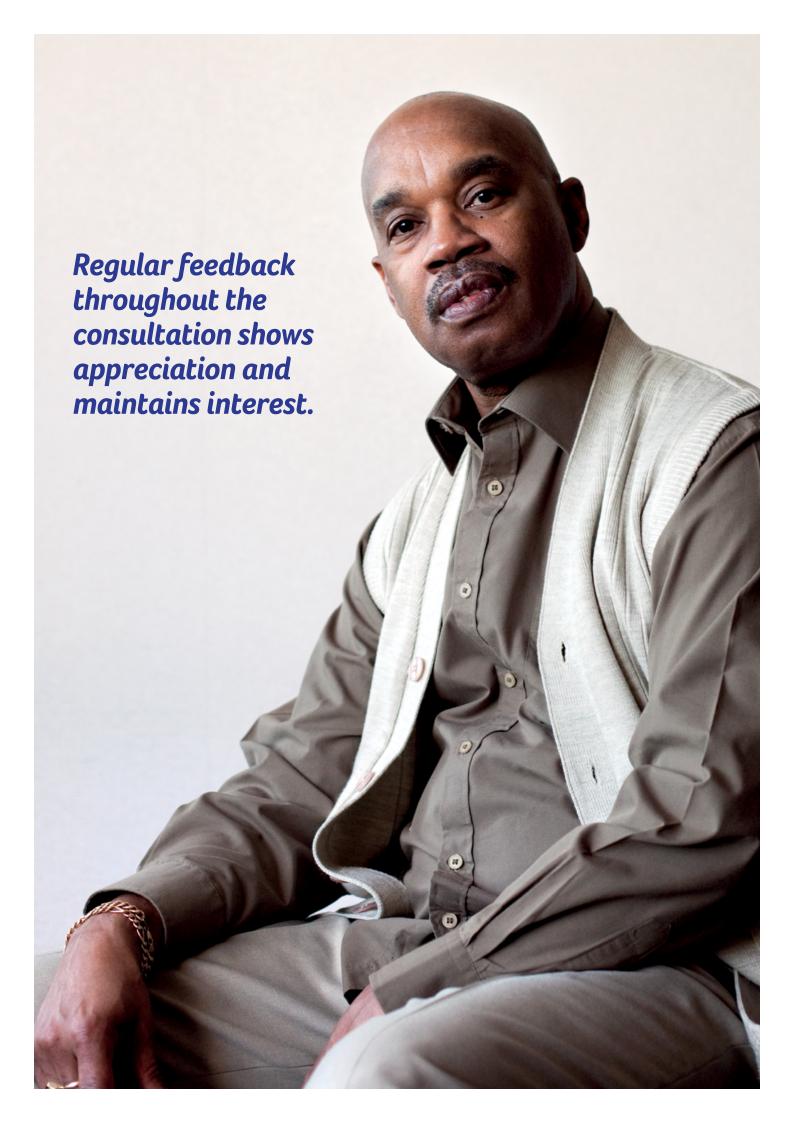## Case study: BME elders project in the Midlands

In the East Midlands, a regional BME elders project was developed with funding from the Equality and Human Rights Commission. Consultants provided support and capacity-building for small groups of older people to help them (a) identify suitable local engagement opportunities, which they wanted to get involved in and influence in some way, and (b) develop their skills and confidence, such as speaking in public meetings, writing letters and making phone calls to officials.

4.7 Feeding back afterwards

Regular feedback throughout the consultation shows appreciation and maintains interest. Forums and participants will have ideas for good practice regarding feedback. People involved in consultations will want to see set out:

• what was consulted on
• what the responses were
• what action has been taken as a result of the responses
• what action has not been taken (and why).

A summary of the feedback via radio and other press avenues, which can reach a wider audience, is also appreciated.

Regular feedback throughout the consultation shows appreciation and maintains interest.

5 Mechanisms for engagement

5.1 Older people's forums

The aim of older people's forums is to give older people a voice. Many neighbourhoods will have one or more forums or other groups that represent the interests of older citizens living in that geographical area. These groups are generally independent, although they may receive funding and/or support in kind from local statutory or community and voluntary organisations.

Cambridge Older People's Enterprise undertakes regular surveys of their members on behalf of external bodies, for example, the Care Quality Commission, and has produced a series of leaflets about local services.

For 12 years the Speaking Up for Our Age programme at Age UK has supported the development of older people's forums by providing information, a toolkit, and convening annual regional conferences for forums to meet and share experiences and ideas.

In the West Midlands there are 65 Speaking Up for Our Age forums. Their forum meetings include 1,700 people every two months and engage a wider network of 4,500 older people. Over the last year these forums have conducted 23 surveys and put forward key issues to the local authorities on important concerns that affect older people, including transport, health and social care, low income levels, rising costs and housing.

There are some 600 forums across England and they may have hundreds or even thousands of members. As grassroot groups, run by and for older people on a democratic basis, they each operate differently.

Forum representatives often have a place on the local Older People's Partnership Board and should be well placed to join the new health and wellbeing partnership boards to ensure that the voice of older people is heard when planning and developing services. Clearly, forums need to be resourced to provide this input effectively.

Surrey's 50+ forum consults its 1,400 members on most issues, such as mineral licences, waste policy or transport, for example.

The key to the success of independent forums is that they work towards having the widest and most inclusive membership possible, so as to properly represent the voice of older people. They often hold open or public meetings, which provide a good mechanism for engaging. They also operate well as communication networks, disseminating information through meetings and newsletters.

To work effectively, forums need support. This is often obtained through local authority or small grant funding. Other practical support that local authorities can provide includes access to meeting rooms, minute-taking, rent-free offices, help with transport to meetings, photocopying, mailings, information, help with printing costs and publicity and communication.

Forums can be an excellent means of reaching out to people whose voices are seldom heard, where they are funded and supported. Many local authorities support local BME groups, which can feed into the local generic forum and seek its support for their campaigns.

Forums may cover a very local area, such as a village, town or district. Increasingly county councils are resourcing county-wide associations of forums, which can share concerns and raise issues on a county-wide basis. The South East, South West and London regions have regional networks of forums.

The South West Seniors' Network is a regional body of 60 older people's forums that have been set up by older people for older people. It highlights issues and inequalities and has an estimated 40,000 members.

As well as providing a conduit for local authorities and the health economy to inform and consult with significant numbers of older people, forums can also provide the following valuable functions.

1 Forums aim to enable older people to have an influence and a voice. There are many examples where older people's campaigning is making communities better places for people to live.

2 Forums may have the capacity to undertake research. For example, Eastleigh Southern Parishes Older People's Forum[6] has undertaken five research projects. A growing number of forums also have links and undertake research with universities.

3 Forums are well informed about local needs, local services and facilities.

4 Forums promote active citizenship and opportunities to use skills and knowledge to contribute to society.

5 Forums provide social opportunities for their members, which help to combat loneliness and isolation. These activities may have a wider impact. For example, they may include physical activities, computer training or intergenerational activities.

5.2 Older people's champions

In some cases, older people's champions have been effective in ensuring the involvement, participation and engagement of older people in the planning and review of all aspects of a local authority's work. They have a key role in holding the local authority to account to older people. A good champion should have relevant understanding and experience, as well as strong representational skills. The champion can specifically look at tackling the eradication of age discrimination, consider older peoples' issues in planning and decision-making and find ways to ensure that people over 50 are at the heart of decision-making processes. (See the Department of Health's toolkit for older people's champions.[7])

Bristol Older People's Forum undertakes an annual survey of its forum members' views and concerns, and wrote a Pensioners' Charter.

5.2 Older People's Advisory Groups

In some areas the local authority has established Older People's Advisory Groups (OPAGs), which comprise older people who may be representatives from organisations that provide services and work with older people. These are different to forums that engage with older people directly. OPAGs often have a valuable role to play in advising about existing services and the practicalities of reconfiguring or designing new services. In many areas, the OPAG representatives are elected from the local forum.

6 Levers for successful engagement

This checklist for successful engagement indicates some of the key elements. Successful engagement:

1. Has transparent purposes, aims, and processes for engagement.
2. Takes the diversity of the community into account when planning processes, demonstrating clear commitment to promoting equality and inclusion in all aspects of the process and has a clear strategy for achieving this.
3. Treats people with consideration of their needs.
4. Is reviewed and evaluated to improve practice.
5. Keeps participants and people in the organisation informed.
6. Shows older people how they have influenced decisions and what difference these have made.
7. Develops strong networks of older people willing to share their views and experiences.
8. Uses outcome-focused performance indicators, such as those used in Outcome Based Accountability.
9. Publicises successful outcomes from engagement.

The following approaches have also proved effective in delivering successful engagement.

1. A commitment from the local authority's cabinet to involve older people.
2. Investment of time and money to develop an effective older people's forum, which gives huge benefits in the long term.
3. A county-wide network of older people's forums.
4. Wide and inclusive networks of older people, which provide a valuable reflection of the views of a diverse population.
5. The provision of information and support to participants, to help them understand strategy and plans.
6. Research conducted by older people's forums to provide powerful evidence for change.
7. Involvement of older people at all planning meetings where decisions are being made on matters of importance to them. Note the slogan: 'Nothing about us without us'. All subjects are relevant, as demonstrated by forums' involvement in issues as wide-ranging as waste management and maternity services.
8. The contribution of district councils to improving outcomes for older people and working with county councils to develop older people's strategies.

Notes

1 Age UK (2011) *Engaging with Older People Evidence Review*

2 Age UK (2011) *Engaging with Older People Evidence Review*

3 Sherry R. Arnstein (1969) *A Ladder of Citizen Participation*

4 Eastleigh Southern Parishes Older People's Forum (2007) *Bleak Housing*,
   available at: www.espopf.org.uk

5 East Sussex County Council Supporting People Service-user Involvement Policy, available at:
   www.eastsussex.gov.uk/NR/rdonlyres/A428508F-6F4E-4FCC-9512-A5327A4A42AB/0/SP_
   ServiceUserInvolvementPolicy_June2009.pdf

6 Eastleigh Southern Parishes Older People's Forum: www.espopf.org.uk

7 Department of Health guidelines for Older People's Champions:
   www.dh.gov.uk/en/Publicationsandstatistics/Publications/PublicationsPolicyAndGuidance/DH_4085666

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