

Research report

# Qualitative Research into enhanced Jobseeker's Allowance provision for the 50+

by Andrew Thomas and Alison Pemberton

Department for Work and Pensions

Research Report No 766

# **Qualitative Research into enhanced Jobseeker's Allowance provision for the 50+**

Andrew Thomas and Alison Pemberton

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Department for Work and Pensions

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# Abbreviations

BtWS	Back to Work Session
DEA	Disability Employment Adviser
DRA	Default Retirement Age
DWP	Department for Work and Pensions
ESA	Employment and Support Allowance
FJR	Fortnightly Jobsearch Review
FND	Flexible New Deal
IB	Incapacity Benefit
IS	Income Support
JRFND	Jobseekers Regime and Flexible New Deal
JSA	Jobseeker's Allowance
JSAg	Jobseeker's Agreement
NJI	New Jobseeker Interview
SPA	State Pension Age
TR	Targeted Review
UC	Universal Credit
WFI	Work Focused Interview
WTC	Working Tax Credit

# Summary

## Background

With removal of the Default Retirement Age (DRA) and the rise in State Pension Age (SPA), there is an expectation that people will in future have longer working lives. This presents a challenge to Jobcentre Plus in that it can expect an older client base in coming years.

Additional support was introduced from April 2010 for Jobseeker's Allowance (JSA) customers over 50 years of age believed to face age related issues, in the form of three voluntary measures:

- access to work trials from day one;
- entitlement to an extra 30 minutes of adviser time; and
- eligibility to be fast tracked to Stage 3 of JRFND.

The policy aim was to support their return to work and to help them to stay in work for longer. Enhanced adviser training was introduced at the same time to support the changes.

Insite Research and Consulting was commissioned to carry out qualitative research into the effects of the new measures and the adviser training in the first six months from their introduction.

## Research aims and objectives

The research was carried out between October and December 2010 and aimed to examine the experience of being unemployed for older workers and whether (and in what ways) the new measures introduced for JSA customers aged over 50 had offered support in helping them to return to work. The research also assessed the additional training that advisers had received, and aimed to examine how advisers engaged with customers aged over 50 and how they were addressing customers' perceptions of the barriers to work that they faced.

## Key findings

### **Adviser training**

About half the total expected number of advisers had completed the workbook element of the training in the first six to seven months, and a smaller number had gone on to undertake the interview skills facilitation element. However, those who had completed the training by October 2010 may not have been those who by undertaking it could most affect the success of the 50+ measures.

Almost all found at least some elements of the workbook useful and several were using parts of it directly with customers – in particular the signposting information regarding external 50+ support organisations and websites. The aspect of the skills facilitation workshops seen as most valuable was the opportunity it afforded to discuss 50+ issues and to exchange experience with colleagues from other offices.

The training was generally felt to be most relevant to less experienced advisers, though its structure was seen as close to other general skills training being undertaken and as such the specific 50+ content and relevance was sometimes being overlooked and undervalued.

### **Adviser perceptions of the 50+ customer group**

Advisers showed a good understanding of 50+ customers and were generally confident that they were able to recognise and meet the needs for support into work that they might show. Fifty-five was seen by many as a more defining age 'watershed' than 50, but age was not automatically treated as an issue, and not flagged as a problem unless already seen as such by a customer.

Perceived proximity to SPA was seen as a prominent feature affecting the way 50+ customers thought about work, though there was some evidence reported that people may be beginning to think about working longer. Many older customers were, nevertheless, said to be looking to 'wind down' their work in terms of hours, travel and stress, and many advisers felt that this mind-shift towards retirement was difficult to argue against and that there were no obvious incentives to keep a customer seeking work if their inclination was to sign off and the financial pressures on them to work were not an over-riding factor in their employment decision making.

The key defining 'sub-group' within the 50+ at the time of the research was those with long work histories who were recently redundant. This included people from all backgrounds who had worked in positions of manual labour, skilled labour or had a supervisory, managerial or professional role. For advisers, it was this characteristic in particular that meant that older customers were different to younger unemployed people.

As well as barriers such as ill health, high wage expectation, and employer age discrimination, the 50+ were seen to face an important set of challenges deriving, ironically, directly from the strength of their previous work record.

### **Delivering the 50+ measures**

The new 50+ measures potentially fitted un-problematically within the existing practices of Jobseekers Regime and Flexible New Deal (JRFND), but importantly the 50+ were felt to require an additional process of assessment and identification of needs in order to target available support effectively and in timely fashion. The timing of such support interventions was made difficult by the heterogeneity of the 50+ customer group: while a considerable number were seen as likely to benefit from earlier support, an equally large group were felt to first require time to adjust to their situation.

Fifty plus customers were said to be mostly highly motivated and focused on getting back to work, and as such the processes designed to remind customers of their obligations as benefit claimants, and to enforce JSA conditionality, were seen as less appropriate for many 50+ customers and as potentially counter-productive.

Many customers presented advisers with a challenge in getting them to engage with the process of help, and subsequently in getting them to broaden their job search beyond the area of work with which they were familiar. In helping older customers, advisers felt that although the available, generic support contract provision was a useful 'first port of call', there was a need for more bespoke provision focused on specific 50+ needs. Where this existed locally through non-contracted providers it was being widely used and was said to be appreciated by customers. The mode of delivery of support contract provision was most widely commented upon as not suiting 50+ customers. Large groups of mixed ages and motivations were raising concerns that the specific needs of older customers were not being met.

The three available measures for 50+ customers all had a low profile and advisers had little personal experience of using them. Most advisers felt the measures made most sense 'as a package' and had been seriously weakened by the decision in July 2010 not to go ahead with the planned new 50+ support modules because of funding constraints.

Work trials, although widely seen as highly suited to older job seekers, were no longer being promoted in several districts, but where they were being used they were said to be effective in getting people to try new types of work, prove themselves to employers, gain confidence in new roles and most importantly to get into sustained jobs.

Extra interview time was somewhat obscured in practice, and in the minds of advisers, by numerous other stated opportunities to provide customers with interviews if they needed them: while advisers generally felt they could provide extra time whenever it was needed, it was not clear whether the attempted 'ring-fencing' of extra interviews for the 50+ was resulting in a greater proportion of time being allocated to this customer group or not.

Very little fast-tracking of 50+ customers to Stage 3 was taking place, and where it was it was almost always for customers with health issues or those seeking to go down the self-employment route. There was a widely expressed feeling that outside these two groups there was little point in fast-tracking 50+ customers because there was not much in the way of extra help available after fast-tracking that could not be provided without it.

### **The JSA 50+ customer experience**

Customers typically started with optimism that they would quickly return to work, though often experienced something of a crisis after a few months if still out of work. Experiences of failed job seeking tended to reinforce suspicions that their age was a significant barrier to their finding work.

Many customers wanted to get back into full-time work as soon as possible, but there was a discernible shift in attitudes among those close to SPA, with thoughts of retirement being more prominent. Significant numbers of customers were seeking to down-size their work in terms of the hours, travel time and stress involved, and saw their current job seeking as an opportunity to do this, although in practice down-sizing was rarely as straightforward as they had anticipated.

Customers' experiences of Jobcentre Plus and their views of Jobcentre Plus staff varied widely from the very positive to the very negative, with an overall tendency for more negative remarks to be directed at staff involved in routine signing on, and more positive responses directed towards advisers. Because many customers had never set foot in a job centre (or not for a long time) they felt disorientated and out of place there and some were very distressed by the experience. Most customers professed a feeling of alienation, heightened by what they described as an impersonal process early on. In particular 50+ customers felt their proven work history entitled them to a different sort of treatment to other claimants.

There was a high level of expectation for more active help from Jobcentre Plus, and many customers expressed the wish for personal adviser support from very early on; even from day one. Customers generally reported very good relations with their adviser and in particular appreciated the personal interest shown, the continuity of support provided and the pro-active help they often received. The balance of evidence appeared to point to generally good practice from advisers in addressing age related issues, with the possible exception of some customers close to SPA who thought advisers had encouraged them to give up trying to find work.

Customers' comments about support contract provision to which they had been referred echoed many of the concerns expressed by advisers, though most had managed to get something positive from it.

Customers experiences of the 50+ measures also mirrored the low profile of these measures in the minds of advisers. Many struggled to recall any extra interviews; many work trials turned out not to have been specifically early work trials; and fast-tracking was remembered best by those case loaded with a Disability Employment Adviser (DEA) or provided with self employment credit. Of the three measures, work trials were the best appreciated by customers. They saw the direct link to a job and also appreciated the opportunity they gave for their adviser to act as an advocate for them with an employer, for the chance provided to prove work skills, and for the boost they could give to self confidence.

## Conclusions

There was a demand from both advisers and customers for bespoke 50+ provision, and evidence that existing generic support contract provision was not always serving older customers well. The lack of such specialist modules made advisers reluctant to fast-track people, despite a demand from many customers for more intensive adviser support from early in their JSA claims.

The three 50+ measures had a low profile everywhere, and some local district policy decisions, such as the non-promotion of work trials, could be seen to be acting counter to the intended effect of the initiative. The strong operational imperative felt by advisers was for a tangible 'end-product', in the form of an incentive or a referral, from meetings with their customers. As a consequence of the lack of bespoke 50+ modules, many advisers felt the measures to run against the grain of their own best practice, or not to fit comfortably into the practicalities of their job.

Support needs assessment processes for 50+ customers were not entirely clear. A generally reactive model, coupled with a laudable desire not to create an issue about age if it was not already perceived to be a problem by the customer, meant that needs were generally picked up in scheduled meetings with advisers (such as review meetings) rather than by any more flexible means such as via comments, queries or requests made when routinely signing on. Referrals to meetings with advisers from contacts such as these were said to be uncommon. The default in most cases was thus that customers were recognised as having extra support needs precisely because they had remained out of work for a certain length of time.

Fifty plus customers tended to see themselves as different from other JSA claimants and felt that their long work history entitled them to somewhat different treatment. Reminders about obligations and conditionality alienated many customers still further from the Jobcentre Plus process for this reason and could appear to be counter-productive – perhaps justifying the feeling of some advisers that this customer group required a slightly different approach. Marked among 50+ customers was a tendency to enter unemployment in optimistic mood but to hit a 'crisis' a few months later when their job-seeking efforts had failed to get them back into work. This, and the potential for developing a resignation to a 'de facto retirement' mentality, were two key challenges facing advisers, particularly with customers approaching SPA.

## Implications for policy

The training had two broad purposes: to help advisers understand more about 50+ customers; and to underpin the 50+ recession measures. The research illustrates the need to re-iterate that training in 50+ issues should be available for all advisers who come into contact with 50+ customers. For the measures to be as effective as possible, the adviser training supporting them needs to be targeted on those staff seeing customers early in their claims. It also needs to carry a stronger message about the importance of this customer group to other areas of government social and employment policy, if advisers are to give it greater priority.

Advisers were strongly of the opinion that the availability of bespoke 50+ provision to which they could refer customers would add important content and focus to advisory meetings and would greatly strengthen the value of the remaining measures. Greater ownership of the measures might be achieved by making bespoke provision available to advisers as a referral option. The measures appeared to be working most effectively where they were perceived to enhance existing practices – for example with the fast tracking of customers with health problems and customers seeking self-employment support. It would also be worth considering whether the training for staff could be re-focused around the key points in the customer journey through JSA, which would make it more readily recognisable by advisers and might relate more directly to their operational experience and priorities.

The current tension between off-flow targets (which can be met through a customer's retirement or effective retirement and signing off the register) and the broad policy aim of extending working lives, appears to warrant attention, and clear policy priorities need drawing up regarding how to treat those approaching SPA.

# 1 Introduction

## 1.1 Background

The number of people claiming Jobseeker's Allowance (JSA) and who are aged over 50 is large and continues to grow. Unemployed people over 50 face particular challenges in the labour market. They generally take longer to get back to work and are at greater risk of drifting into long-term unemployment or prolonged economic inactivity. Additional support was introduced from April 2010 for customers over 50 years of age believed to face age related issues. The policy aim was to help such people to stay in work for longer and to help and support older job seekers to return to work. Enhanced adviser training was introduced at the same time to support the changes.

## 1.2 Policy context

The broad policy context for the new 50+ measures was set by the need to address an ageing population. Along with removal of the Default Retirement Age (DRA) and the rise in State Pension Age (SPA), there is an expectation that people will in future have longer working lives. This presents a challenge to Jobcentre Plus in that it can expect an older client base in coming years. In addition to these initiatives, the Government intends to reform 21st century welfare through the introduction of the Work Programme and to streamline the benefit system through the introduction of Universal Credit.

## 1.3 Rationale

It was anticipated that older people in the workforce were likely to be particularly affected by redundancies and reducing numbers of job vacancies during economic recession. There was also recognition that, as a group, the number of JSA customers aged 50 years and over was set to rise both absolutely and as a proportion of all unemployed people. Prior to the introduction of the Universal Credit, growing numbers of people were expected to move from other benefits (Employment and Support Allowance (ESA) and Incapacity Benefit (IB)) or to be claiming JSA because they would no longer be eligible for Pension Credit. More 50+ customers were also expected to fall under eligibility for Joint Claims, thus bringing their partners with them to the JSA register.

Previous support for older job seekers in the form of the New Deal 50+ had been ended with the introduction of Flexible New Deal (FND), which marked the introduction of a more individualised, flexible approach to adviser services. The policy measures, under review here, were designed to draw attention to this customer group and to offer advisers additional flexible options for addressing their older customers' individual difficulties and barriers to employment which were related specifically to their age and their perception of the role their age might be playing in their attempts to find work.

## 1.4 Responses to previous research

It has long been acknowledged that many older people not only share many of the barriers to employment experienced by other age groups, such as issues of confidence and lack of skills and qualifications, but can also have additional barriers specific to their age. These include:

- age discrimination by employers;
- out of date and un-certificated skills;

- higher incidence of physical and mental health conditions;
- greater likelihood of family caring responsibilities including older dependent adults;
- lack of familiarity with the modern labour market;
- high levels of financial commitments.

An evidence review published in January 2010<sup>1</sup> looked at the body of research findings from Department for Work and Pensions (DWP) research undertaken between 2000 and 2008 concerning back to work services and support for the 50+ age group. The review highlighted that job seekers aged over 50 years were reported to:

- be more likely than younger people to have a health condition or disability that restricted their engagement with job search;
- have substantially lower rates of take up of training compared to younger people, despite the fact that there were significant employment gains for them associated with both shorter and longer term training options;
- have a greater interest in part-time and flexible employment including specific options for combining work with pension income;
- value regular adviser meetings and support with job searches, IT skills and the preparation of CVs;
- view as an asset having an adviser of similar age to themselves;
- be particularly likely (along with all those with a manual work background) to benefit from individual action planning;
- include a high proportion of people with professional and managerial backgrounds who were less likely than others to say that they found Jobcentre Plus services useful.

Research since 2008 has reinforced and elaborated these findings.

A 2009 report on older workers<sup>2</sup> emphasised the heterogeneity of the 50+ group while acknowledging that many among them were seeking to 'down-shift' their employment, both in terms of hours and levels of responsibility, prior to retirement, and that there was considerable un-met demand for greater flexibility at work. It also reported that there was evidence of some resistance among older workers to the idea of extending their working lives (with women on average wishing to retire at 62 and men at 63) and that both cultural and structural barriers remained strong in this area.

A 2010 report looked specifically at the role of Jobcentre Plus advisers and at the ways in which they interacted with older customers during Work Focused Interviews (WFI).<sup>3</sup> It suggested that advisers conducted their interactions with this group somewhat differently compared to when faced with younger customers; being less forceful regarding customer requirements and more likely to agree fewer job goals and to conduct fewer assisted job searches and submissions. Some evidence was also presented that individual advisers modified their approach with older customers, placing

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<sup>1</sup> Vegeris, S., Smeaton, D. and Sahin-Dikmen, M. (2010) *50+ Back to Work Evidence Review and indicative guide for secondary data analysis*. DWP Research Report No. 615.

<sup>2</sup> Smeaton, D., Vegeris, S. and Sahin-Dikmen, M. (2009) *Older Workers: Employment preferences, barriers and solutions*. Equality and Human Rights Commission Research Report No. 43.

<sup>3</sup> Irvine, A., Sainsbury, R., Drew, P. and Toerienet, M. (2010) *An exploratory comparison of the interactions between advisers and younger and older clients during Work Focused Interviews*. DWP Research Report No. 634.

less emphasis on a return to work and treating it as a less definite probability than with younger customers.

Operationally, the 50 years age cut off was felt not to be a particularly meaningful distinction, with other groupings of customers (for example, tradesmen recently made redundant) being more apparent in terms of shaping adviser responses. Age discrimination and other age related barriers were acknowledged as real issues eliciting a supportive response, although the specific remit of advisers was noted as limiting the possibilities for them to provide practical help.

The recommendations from this report, for improving the effectiveness of advisory support for older customers, focused on strategies that might be adopted within interview practice. They included: inviting customers to elaborate on their concerns about age discrimination; offering examples of employers with a positive approach to older workers; identifying particular, personal skills to offer employers; advising on how to convey such information in applications; and providing empowering information on age discrimination legislation. All of these aspects were taken forward into the design of the new 50+ measures.

### 1.5 The new measures for the over 50s

The service enhancements for JSA customers aged over 50 were rolled out nationally from April 2010. One element aimed to highlight to advisers, through newly designed training, the possible characteristics, circumstances and challenges of the 50+ customer group, and to offer suggestions as to how to deal with them. A second element sought to make some administrative changes to eligibility criteria within Jobseekers Regime Flexible New Deal (JRFND) that would assist advisers in making appropriate and timely support interventions for this group of customers on a voluntary basis. The measures<sup>4</sup> were intended to fit into the then current arrangements for JRFND and comprised:

- training for Jobcentre Plus advisers, made up of a workbook for completion on the intranet and an optional follow up interview skills facilitation workshop;
- an additional 30 minutes of adviser time for 50+ customers identified at 13 weeks as having extra age-related support needs;
- immediate 'day one' access to work trials for the over-50s;
- optional early entry, or fast tracking, to Stage 3 of JRFND and the more intensive support usually only available after six months of a claim;
- Two bespoke Support Contract modules for the over 50s claiming JSA were planned but, due to funding constraints, were not taken forward.

### 1.6 Research aims and objectives

Insite Research and Consulting was commissioned by DWP to undertake research into the effects of the introduction of the new measures for JSA customers over the age of 50. The research involved face to face in depth interviews with 60 customers and 40 staff. It was carried out between October and December 2010 and aimed to examine the experience of being unemployed for older workers and whether (and in what ways) the new measures introduced for JSA customers aged over 50 from April 2010 had offered support in helping them to return to work.

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<sup>4</sup> A fuller description of the new policy measures can be found in Appendix A.

In addition to the exploration of the delivery and perceived effect of the new measures for older JSA customers, the research also assessed the additional training and other support that advisers had received to enable an enhanced service offer for older customers to be delivered. Delivery of the new measures was explored to gain insights into the experiences of advisers in helping 50+ customers move from benefit into work. The work aimed to examine how advisers engaged with customers aged over 50 and how advisers were addressing customers' perceptions of the barriers to work that they faced.

It was also an aim of the research to explore the perspectives of older workers regarding the extent to which they see and experience age as a barrier to moving into work, in order to provide new information on experience of the JSA regime for older job seekers. The findings are intended to facilitate policy decisions being made about the service delivered to older workers and will inform decisions on the future of welfare policy and the Work Programme.

### 1.6.1 Key research questions

Overall, the research sought to assess, six months after implementation, how the new measures had been experienced by staff and customers, how effective they had been in helping JSA customers aged over 50 to move from benefit into work, and the reasons behind their effectiveness. Specific key research questions included the following:

- What were the attitudes and experiences of Jobcentre Plus advisers to the new enhancements to welfare to work measures for the 50+ client group?
- Did advisers have a good understanding of the challenges faced by those JSA customers aged over 50 and did they feel that they had the appropriate training and skills to help them engage in job search activity?
- If advisers had undertaken the new training, was it helpful? Did they feel more confident dealing with older customer groups having undertaken the new training, and how were they using the workbook?
- How had the enhanced support services for the 50+ age group been implemented, was there any significant variation between districts or offices, and what has gone well or not so well, and why?
- Did advisers feel that the optional additional 30 minutes in Stage 2 for over 50s was useful? Why were advisers offering the extra adviser time? What particular issues or problems tended to be the trigger?
- Were advisers actually fast tracking people over 50 to Stage 3 JRFND? Was this being done on the basis of needs and disadvantage, or to access six month offer provision?
- At what stage were customers being referred to work trials, what was their typical duration and content, and what the outcomes in terms of moving into work and gaining useful skills and experiences?
- Were there any differences by age in the way customers viewed the new measures, or in the immediate outcomes they were experiencing?
- What were the main needs of the customers using the enhanced services and were they being met?
- What views did customers have of their interactions with Jobcentre Plus and advisers?

### 1.7 Summation of findings

The research found that advisers had benefited from the training and that it had succeeded in raising the profile of the 50+ customer group. However, training had not yet reached all those with contact with 50+ customers, and needed targeting in particular on less experienced advisers and those with customer contact in the early stages of JSA claims.

The new 50+ measures had been weakened by the dropping of bespoke 50+ support modules from the original proposals and had a low profile among advisers, many of whom had used the measures only very infrequently, if at all.

The 50+ customer group was found to have a number of weaknesses in their search for employment that, ironically, stemmed directly from the success many of them had achieved in sustaining long working histories (such as lack of interview experience and no practice at curriculum vitae (CV) writing).

Fifty+ customers were also often found to have a distinctive psychological journey through the early months of unemployment; early optimism about a return to work often being followed by disillusionment and depression after some weeks. Advisers were having to deal with this, and the timing of support interventions were crucial in meeting customers' needs and in keeping them engaged with the processes of job searching.

Customers generally reported very good relations with their personal advisers and made many positive comments about the support they had received from them. However, the new measures were not widely being used to facilitate timely interventions, and were seen by many advisers as not providing anything that could be used to the benefit of customers over and above what was already in place before their introduction and achievable through the application of existing flexibilities.

### 1.8 The structure of the report

The remainder of this report is structured as follows:

Chapter 2 deals with the training provided to Jobcentre Plus advisers to better equip them to help customers aged over 50 and support their efforts to return to work.

Chapter 3 explores the perceptions that advisers have of the 50+ customer group, their views regarding key sub-groups within the 50-64 year old cohort, and their experiences of making referrals for this customer group to support contract provision and other sources of help.

Chapter 4 looks more closely from the point of view of advisers at how the new measures have been delivered in Jobcentre Plus offices, what constraints and limitations have been experienced, and what local flexibilities may have been operative.

Chapter 5 examines the 50+ customer experience of JRFND and the new measures, following the customer journey from initially claiming JSA via referrals for support through to leaving benefit, whether by entering work or to some other destination.

Chapter 6 sets out the conclusions to the report and draws out some implications for future policy.

## 2 Training for advisers

This chapter looks at the training that was introduced for Jobcentre Plus advisers to support the introduction of the new 50+ measures in April 2010. It presents the experiences of advisers who had undertaken one or both of the elements of the training, and assesses how useful the training has been, what elements of the training have been most appreciated, and what the effects of undertaking the training have been on advisers' perceptions of the 50+ customer group and their needs for help and support back into work.

New 50+ training for advisers had two broad aims: to help advisers understand more about older customers and thus carry out more effective in-depth interviews with them; and to underpin the extra support measures for older job seekers that were introduced in April 2010.

The planning intention was thus to raise awareness among advisers of the issues affecting the 50+ customer group, to help them to identify customers in need of additional support, and inform them of what is available to 50+ customers at different points of their Jobseeker's Allowance (JSA) claim.

It comprised two elements: first, a workbook, available on the intranet and expected to take approximately two hours to complete; second, a half-day interview skills facilitation session, at which advisers could work through the ideas and information from the workbook in role-play and case studies alongside other advisers from their district.

### 2.1 Adviser selection to undergo training

The policy intent was that all advisers who might have contact with JSA customers aged over 50 should undertake the workbook element of the training, and that those requiring it should also take part in a face to face interview skills session. While customer footfall at most Jobcentre Plus offices had reduced or levelled out since the busiest period six to twelve months previously, there were still widespread reported concerns about the amount of adviser time that the training would take up. An operational compromise was reached whereby one adviser per Jobcentre Plus office would be nominated to undertake the workbook by the launch date, with other relevant advisers undertaking it later and as work pressures allowed.

Six months after the new measures were introduced, the extent to which the workbook training had indeed been undertaken by other advisers with 50+ contact varied greatly between offices and between districts. Head office estimates put the total number of advisers expected to undertake the workbook at approximately 12,000. By November 2010, the best estimates were that roughly half this number had completed it.

The priority afforded the training seemed to vary greatly also. In some offices it appeared to have been accorded a high level of importance, and undertaken as planned:

*'I was one of the people picked to pilot this in the office, and I know it's been rolled out to other advisers subsequently, and they've all gone through the workbook.'*

Advisers chosen to undertake the workbook were selected in some offices on the basis of an identified individual training need, and there was a widespread perception that the training would be of most use to those with little customer interviewing experience. In other offices, however, it appeared that operational and resource pressures had meant that the training had been given much lower priority and that the process of nominating advisers to do the workbook was very much more *ad hoc*.

*'[My manager] just had to get someone to do it and, you know, I was available...'*

In several offices, respondents did not think that the workbook had been undertaken by anyone else since the initial nominee. In one instance advisers put forward as respondents to this research had only looked at the workbook because they knew they were going to be interviewed.

Initial nominees to undertake the workbook had frequently been chosen from among the more experienced advisers in an office. As long-standing advisers, these were often people with extensive experience of the older customer group and related issues. Some had had previous involvement in delivering the New Deal 50+ programme. They also tended to be advisers whose current responsibilities lay primarily, or even exclusively, within Stage 3 of JRFND.

The new measures essentially relate to adviser decisions made in Stage 1 and Stage 2 of JRFND. The need for extra interview time with an adviser was envisaged as being primarily identified at the Jobsearch Review meeting 13 weeks into a customer's claim, or at some point during the more frequent signing-on period of Stage 2. Equally, identification of the appropriateness of fast-tracking a customer, or facilitating 'day one' access to work trials must, by definition, take place early in a customer's JSA claim to make a difference.

Therefore, while the training may well be contributing to more effective interviews by Stage 3 advisers, it is likely to have its greatest effect on customers' journeys through JSA via its impact on Stage 1 and Stage 2 advisers. This was recognised by some respondents:

*'I think really...maybe some of the Stage 2 people should have gone on it as well.'*

This will perhaps only be a problem in the early months of the initiative, or if the training does not ultimately get rolled out to all advisers having 50+ contact. In the absence of such total coverage, there were suggestions that some advisers remained unaware of the training, and there were no explicit or formal mechanisms in place for those who had been through the workbook to cascade lessons from it to others. Communication about the 50+ measures had typically been by email, which several advisers said meant that the message could easily get lost among the heavy email traffic they experienced. Some of the advisers interviewed, who had completed the workbook, were unaware of the other available element of the training - the interview skills facilitation seminar.

## 2.2 Responses to the 50+ Workbook

The workbook was generally well-received by those who had undertaken it, and some less experienced advisers felt it had extended their understanding of how to deal with the older customer group.

*'Although I don't feel uncomfortable with the [50+] customers, it was still helpful, the stuff in the workbook gave you food for thought, and it made me sort of just widen my approach, and know that...there's maybe more issues involved than I thought.'*

Others too felt it would be particularly useful to a less experienced adviser.

*'It's more the...most inexperienced...that I think it would be really helpful for - you know if you were new in the department and maybe hadn't seen 50+ customers before.'*

Many felt its main value for them had been in revising and reinforcing things they already broadly knew, rather than bringing a lot of new insights, as with this Stage 2 adviser:

*'I'd say the workbook sort of crystallised a lot of the things I had thought of before. I don't think there was anything radically new, anything I hadn't considered. But...I suppose it crystallised a lot of things and helped put things into words.'*

Although many felt the content of the work book to be largely ‘common sense that you’d just do anyway’, even those with considerable years of experience as advisers found it useful to be reminded of the full range of issues that could arise with older customers. This was especially the case given that advisers did not tend to be ‘specialists’ dealing exclusively with the 50+ customer group and so were not being reminded on a daily basis of the possible issues for older customers. While more experienced advisers felt familiar with its content, therefore, they nevertheless appreciated its organising effect and its specificity to the practical realities of interview exchanges with customers.

*‘I didn’t feel as though there was anything in there that was particularly new. It all seems like common sense really. The problem I have is remembering all these different responses that you’re supposed to have if somebody says, ‘Oh I won’t be able to work because of a,b,c or d’ - the responses to challenge that mindset.’*

It was elements of the workbook such as this, that advisers could see as directly related to their experience and to the way they conducted interviews, which were most widely appreciated. The suggestions in the workbook as to effective types of responses that could be made to frequently raised problems and misconceptions were commented upon positively by many advisers.

*‘I think any training you do just gives you a fresh look at something, it focuses your attention. [The Workbook] is designed specifically to make you think about older customers and any potential barriers they might have. And there’s also the section about misconceptions that’s quite good in terms of offering solutions. If a customer comes up with some of these misconceptions themselves, there were specific things you could say...’*

Another aspect of the workbook that was singled out for comment was the characterisation of typical customer mindsets as belonging to ‘animal-types’, as an aid to memory. Again, this was particularly appreciated by those for whom it resonated with their previous experience:

*‘It made me think more about why people were being...some of them are quite submissive you know, they’ll just sit there and agree to anything, and others...are really quite aggressive and angry, and...it makes you kind of realise what’s going on in the background.’*

Advisers were also complimentary about the signposting aspects of the workbook; both the appendix setting out the situations in which the new measures might be applied (which some had printed off and circulated to colleagues), and the reference material relating to national organisations and web-sites, with which few could claim total familiarity.

*‘I wasn’t aware that there were so many specific websites that could give advice to 50+ customers...so that was one thing that I found useful.’*

Where advisers had not seen these aspects of the workbook as immediately contributing to their day to day practice, they tended to be more critical. While they had found the workbook interesting many felt that it had not equipped them in any practical way to deal better with their customers.

As might be expected there were very mixed views about the ‘pitch’ of the workbook’s content given the broad range of its target audience and individual preferences as to learning methods (specifically e-learning). While some felt it was rather superficial, others appreciated its brevity and succinctness.

There were no large differences in reactions to the 50+ workbook between Stage 3 advisers and Stage 1/Stage 2 advisers. The less experienced were somewhat more likely to say that it had extended their understanding of the 50+ customer group. They were also rather less likely than their more experienced colleagues to see a direct connection between the workbook material and the ways in which they might deal with customers, particularly in relation to the new 50+ measures.

Stage 3 advisers were better able to see potential links but also to feel that by the time customers reached them (after six months of their claim) the new measures no longer made a significant difference to what could already be done in the way of supporting them.

Advisers who had been through the workbook did say that they thought it had helped to raise the profile of the 50+ customer group, although it was not always felt that this had yet translated into treating the group in specific or different ways. Also, the rather low-key introduction of the measures (and the dropping of the planned specialist support contract provision) appeared to have counteracted this positive effect for many advisers.

Several said that the workbook itself did not have a strong enough message regarding the importance of the 50+ customer group, and that it had not been sufficiently promoted or emphasised by their managers. Such a stronger message, it was felt, would have given the workbook more impact. As one adviser (seeing customers through all stages of JRFND) put it:

*'I think if the message needs to be...that the over 50 group is going to become more important [and] we want to get people back into work at that stage, so that we can all work longer, then... if it was important, then it should have been a bit bigger you know, and pushed a little harder.'*

### 2.3 Use of the workbook

There was some evidence that the workbook was recognised as being a good and succinct source of information on how to deal with older customers. In one office, it had been printed off in its entirety and put on file as quick reference should an adviser un-used to seeing 50+ customers find themselves having to cover an interview for an absent colleague. Most of the advisers interviewed, however, said that they did not use the workbook with individual customers, nor refer to it on a regular basis. The considerable volume of guidance consequent upon the many and rapid changes being experienced to operating practices, was cited as one reason for this.

*'A big problem we have is the sheer volume of guidance...there are major changes on a regular basis, and it is difficult to look at all the e-mails.'*

Two advisers said that they had made notes when they first went through the workbook and that they now used these notes for quick reference in order to help direct interviews. An additional small number of advisers were making continued use of the workbook by occasionally 'dipping back in' to remind themselves of the kinds of things to be looking out for when advising a 50+ customer.

*'If I know I've got...an older person coming in I'll have a quick look through [the workbook] just to remind myself of the...challenges that they either...perceive they face or they actually do face.'*

There was also widespread use being made of the information in the workbook concerning websites and national organisations offering advice to the over 50s. Eight of these are listed in the section entitled *Additional information and guidance* and several advisers had printed off and photocopied this list for handing out both to customers and to colleagues who had yet to do the workbook training. Those who had previous experience of the sites and organisations, or had been prompted by the workbook to investigate them, generally had their own favourites among those on the list and used a restricted number with customers. The fact that some of the advice was only available on-line meant that sites were not necessarily seen as suited to all older customers.

Because the websites listed refer to nationally based organisations, there was also a feeling in more remote Jobcentre Plus offices that they were of limited value in their particular situation. This was mainly because the 50+ customer group was perceived as preferring to deal face to face with

potential advice-givers, whereas the premises where this could happen were at best located in the nearest large urban areas which were inconvenient and expensive to access.

*'A lot of the websites and organisations are centralised or in big cities so less useful for out of the way offices like [here]...It does tend to be that a lot of the time it's not relevant to here because...to actually access something people have to go somewhere else, and it's very expensive to ask people to travel.'*

The other element of the workbook that was being quite widely used by advisers was the appendix entitled, *Working with customers aged 50 years and over: Referral routes*. In several offices, this was being copied or e-mailed around between advisers. The appendix was seen by many to be a particularly 'practical' part of the workbook, in that it fitted comfortably with existing work practices and was similar in kind to the general guidance available on the intranet for all customer groups, including those aged 50 and over. Most advisers said they routinely used the general guidance.

*'Especially if you're reading through it [the general Jobcentre Plus guidance] with a customer... you can just have a click, you're at your computer, you can click on, read through, and the one set of guidance will lead to the next question, you know will lead to the next one, and it's all convenient and at your fingertips...'*

This further illustrated the fact that a key 'driver' for advisers was having a specific course, a specific financial incentive or a specific element of the support contract, to which they could direct a customer as the outcome of an interview. It was in this light that many saw the withdrawal of the bespoke 50+ support modules as undermining the impact of the training and of the remaining measures. It also appeared to have caused other aspects of the workbook to be overlooked or under-played, in particular the crucial message regarding the importance of adviser-customer interactions early in the advice process to facilitate customer engagement and indeed customer assessment.

## 2.4 Responses to the 50+ Interview Skills Facilitation Workshops

The main positive feature of the training workshops, identified by advisers who had undertaken one, was group discussion and exchange of experience relating to the 50+ customer group. This reflected both a learning style that many advisers found particularly productive, and also a desire to access experience that might not be available within their own local office (especially if it was a relatively small one).

*'There [were] a couple on the course that were 50+ themselves and...we had a really great input of their experiences, because they were that age group I suppose, and they were talking about how they found being 50+.'*

The sharing of experience with others had also clearly brought out the issue of age from the advisers' point of view, and had encouraged exploration of the ways in which an adviser's own age might affect their perception of older customers. For some, this in turn had focused attention on just how 50+ customers might be feeling when they present themselves at the Jobcentre Plus office.

*'I think going on the course definitely reminded you...what maybe they [the customers] are feeling when they're coming in - are [we]...addressing that part?'*

A great many of the 50+ customers interviewed for the research were very vivid in their descriptions of how awkward they felt signing on, suggesting that indeed this is an area where a more thoughtful approach could pay dividends in terms of establishing rapport with customers and improving their engagement with job search support.

Within the overall positive assessment of the 50+ interview skills facilitation workshops, there were a number of reservations expressed by advisers which could be instructive in developing the provision in the future. A quite frequently encountered response was that the training involved was too much like other basic interview training that advisers undertake.

*'A lot of it had been covered...in the training for adviser skills, where we get...six spells of two day training, so...quite a lot of training initially when you become an adviser.'*

In one district this perception was being further reinforced by the way in which the training workshops were reportedly being delivered without the use of any new material. It was speculated that because of this perception Jobcentre Plus managers may have considered the interview skills element of the 50+ training as less relevant to newer advisers who had been through initial training relatively recently. Certainly, some of the less experienced advisers were of this opinion, and did not see the specific 50+ content as particularly important compared to the generic 'interview techniques'. This may have reduced the number of requests to undergo the training in some areas, where very few advisers were thought to have followed up the workbook by asking to attend an interview skills facilitation session.

At the other end of the spectrum were advisers of very long experience in the job (ten years and more) who simply felt that it would have nothing new to offer them. There were, therefore, fewer among the very experienced advisers spoken to who had undertaken the skills workshop than among those of shorter duration in the job. Some had been asked to do the training in spite of their own feeling that they did not need it, and many felt that there had not been sufficient extra value in the session for them, over and above the workbook material, to justify the time spent on the course.

*'I think the workbook was good and it made you think of different things, but I felt the half day was actually wasted because they were just generally talking through things that we'd already encountered anyway.'*

This comment reiterated a widely expressed feeling among advisers that what they most wanted were practical aids to conducting their job better, and that most were looking specifically for this in any training they undertook. There was also the expectation from some early attendees that the workshop was going to provide more detailed information about the 50+ customer support contract modules. Understandably there was a degree of disappointment when this was not the case because the modules had not been taken forward.

To do all the specialist advising and the training, it does seem pointless when you can't actually refer [customers] on.

### 2.5 Perceived training need

The generally positive responses from advisers to the training sit interestingly alongside an almost equally widespread assertion of having confidence in dealing with older customers.

*'But by and large I can't say I've found it any more difficult to deal with and help my 50 plus customers than...any other age group.'*

The feeling was also often expressed that much of what was contained in the training was what they would be doing anyway. There was no sense conveyed by advisers that they were concerned they might be making fundamental mistakes with the 50+ customer group, nor inadvertently reinforcing misconceptions and barriers about getting back to work. As one experienced adviser said in relation to the examples set out and dealt with in the training:

*‘If you’re interviewing anybody and they’re coming up with those sorts of comments and scenarios, then common sense would tell you what to say...If [a customer was to] say “Oh well nobody will employ me” – you wouldn’t sit there and say, “Well, yeah you’re right!”’*

This adviser was quite indignant at the implied suggestion that she might not be able to come up with appropriate responses to older customers’ concerns about their age. She was also at pains to deny that she risked reinforcing their negative feelings in the process of trying to establish a rapport with them. Advisers with less experience to call upon were rather more circumspect in this regard, however, and welcomed the ‘prop’ provided by the response suggestions set out and rehearsed in the training.

*Sometimes [customers] come in with a preconceived idea that there’s no way they’re going to get a job because they’re old, you know...who’s going to take them on? Since I did the workbook I can try and help them in that respect, but before I had that workbook I didn’t really; I wouldn’t know how exactly to target [them]...’*

These observations tend to support the overall interpretation that the training is particularly pertinent and helpful to less experienced advisers, even though it appeared to be the more experienced ones who were accessing it in the greatest numbers (at least in the first six to seven months).

## 2.6 Key findings

- About half the total expected number of advisers had completed the workbook element of the training in the first six to seven months, and a smaller number had gone on to undertake the interview skills facilitation element.
- However, those who had completed the training by October 2010 may not be those most in need of it, nor those who by undertaking it could most affect the success of the 50+ measures.
- Almost all found at least some elements of the workbook useful and several were using parts of it directly with customers – in particular the signposting information regarding external 50+ support organisations and websites.
- The aspect of the skills facilitation workshops seen as most valuable was the opportunity it afforded to discuss 50+ issues and to exchange experience with colleagues from other offices.
- The training was generally felt to be most relevant to less experienced advisers, though its structure was seen as close to other general skills training being undertaken and as such the specific 50+ content and relevance was sometimes being overlooked and undervalued.

# 3 Adviser perceptions of the 50+ customer group

This section presents the understanding that Jobcentre Plus advisers had of the 50+ customer group, exploring their perceptions of their strengths and weaknesses in the job market, and the degree to which these customers were viewed as having a particular identity, particular shared characteristics or specific constraints and barriers to finding work. It looks at adviser's perceptions of the cohesiveness of such a designated group, and explores their views of the significant sub-groups within the 50+ customer group as a whole, both in terms of different, more limited, age brackets and of different customer backgrounds and work/benefits histories.

All the advisers interviewed for this research had some familiarity with older customers, though levels of experience varied considerably. None felt they were seeing a disproportionate number of customers aged over 50, but all were seeing a significant number on a regular basis. A few advisers thought that the numbers of older customers they were seeing, relative to others over 25 years of age, had increased in the last couple of years.

Advisers were generally confident that they could deal with older customers effectively. Indeed, the most frequent response was that those over 50 posed no greater challenge than other customers, even though they did face certain difficulties that were specifically related to their age. There was a good level of understanding evidenced of this customer group and all advisers were able to identify a number of specific issues, problems or barriers that they had found their older customers to be facing in trying to get themselves back into work.

## 3.1 Identifying the 50+ customer group

### 3.1.1 The 50+ label

Advisers were aware of many of the issues that might affect older job seekers but were not always comfortable identifying and generalising about them under the label '50+ customers'. The great diversity and heterogeneity of the older customer group, and the challenge that posed for acting effectively as an adviser, were frequently referred to. For this reason making general judgements about them as a group was seen as difficult or even distorting. Some customers in their forties could be seen to give up on ever getting back to work, whereas advisers had experience of people wanting training well into their sixties. This 'giving up' was seen as the crucial age-related problem to be faced, but a mind-set not limited to a particular age bracket.

Many felt there was a danger inherent in the 50+ 'label' that it might get in the way of treating all customers on the basis of their individual circumstances and needs, as they had been trained to aim to do.

*'I look at them as individuals - it is the individual in front of me, that's who I see and that's who I try to help - [rather than] put them into categories.'*

While accepting that any age bracket would be an essentially arbitrary cut-off, several advisers suggested that, in their experience, the key differences for older jobseekers emerged mainly with people in their mid and late 50s. In this view being aged 55 was seen as a more evident 'watershed' than being 50.

These reservations notwithstanding, a lot of advisers did observe that 50 was often a key age in the minds of certain of their customers, even if as advisers they didn't place too great a weight on it. The customer response, upon reaching 50, that they would never be able to get another job because of how employers would see them, was said to be very widespread. It was even suggested by more than one adviser that reaching 50 could be used by some customers as a convenient excuse for not trying to get back into work.

*'The people who don't want to work, turn 50 and think that they can use that as an excuse.'*

Rather than the bare fact of being 50 or older, therefore, it was the possible perception customers had of their age, and their attitude towards it, that was seen as most important by advisers. In this regard being 50 was sometimes seen as having a 'symbolic' importance for people, and challenging these perceptions was high among adviser priorities when dealing with older claimants.

*'I don't think [the over fifties] are anything completely different...to under 50 customers...It tends to be more personal perception issues rather than anything else.'*

*'You have to challenge, that mindset - "50: out of work".'*

Ultimately, what most advisers were saying was that while they would not use a customer's age to determine their support needs, nor to determine the approach that they as advisers would take towards dealing with those needs, they would respond to customers' concerns and perceptions while remaining mindful of the many background issues that might be facing them as an older person. It was in this light that the adviser workbook and training were viewed as a useful resource.

*'So...you're not separating them from other groups, there are just specific things for a 50 plus customer that you know are there and you can tell them about.'*

Put another way, in dealing with customers, their age was not automatically treated as a primary issue, and most advisers were at pains not to flag it up as a problem if it was not already perceived as being a problem by the customers themselves.

*'If age isn't mentioned as a barrier, I won't plant that seed in a customer's mind. Unless a customer actually says to me they see their age as a barrier, I won't dwell on age related issues.'*

### **3.1.2 Age differences within the 50+ customer group**

Previous research has suggested that the issues advisers have to confront with older customers vary quite markedly within the 50 to retirement age bracket. This was borne out in our research interviews. With the necessary proviso that for some individuals, age was neither seen as a significant motivator, nor a strong determinant of their actions, advisers described a number of general differences between age 'sub-groups'.

A key factor affecting customers' desire or willingness to work, and indeed the number of hours they wished to work, at different ages was seen to be their perception of how close they were to retirement. With customers only just turned 50, retirement was said to be perceived as still quite a remote eventuality.

*'Age...isn't always a huge factor, unless the customer's about 57, 58, 59, when they've maybe only got about a year or two to go before they can potentially claim pension credits. I don't think most customers in their early fifties see that as a barrier.'*

One adviser went so far as to speculate that the message from government about the need for people to continue working for longer in their lives was getting through, and that fewer people were

now starting to think about retirement as soon as in their early fifties. She had observed over a long period that on average her customers' time horizons for working had extended.

*'I would say there has definitely been a change [judging] from the customers that I'm dealing with now. If I went back five or ten years...I would say a lot of customers if I saw them at 50 plus would regard themselves as no longer going to be working, you know, that was it, they weren't going to be working again in the future. [Now] I'm not seeing as many.'*

In line with this observation, most advisers saw greater similarities between customers in their early fifties and forties, than between those in their early fifties and those in their late fifties or sixties. This distinction between customers in their early or late fifties was also seen by some advisers to hold in respect of the level of discrimination that job applicants were facing because of their age.

*'Age-ism does exist. Although the Government wants people to work longer, I would say anybody mid fifties they are definitely coming against a lot of [such] barriers.'*

The 'defeatism' that many advisers were observing from customers in the face of age-discriminatory barriers, was said to be particularly evident among those aged between 55 and 60. However, these factors were seen as potentially even more marked for people over the age of 60, with one adviser describing reaching 60 as marking a 'total mind shift' among her customers. However, some other factors were said to come into play at this stage which affected the make up of the customer group that continued to attend the Jobcentre Plus office. With increased age, progressively greater numbers of people were attaining the required level of National Insurance credits (which for some had been the main or sole reason for continuing their claim) and were leaving the unemployed register.

One suggested effect of this exodus was that it left a higher proportion of customers in the upper age bracket who were either highly motivated by a desire to work, or who were under the greatest financial pressure to do so (for example, through needing to continue paying a mortgage, or to continue signing for benefits in order to meet the requirements of a mortgage protection insurance policy). Perceiving they have no viable alternative but to find work, these customers were reported by advisers to be among the most eager for their help.

*'I've found a lot of the people who are 60 plus want to carry on working and are desperate for any help they can get.'*

A fundamental division for advisers was between those older job seekers who genuinely wanted to find work, and those who did not. With their older customers, this desire was seen, more often than not, to be based on a financial imperative, with most people having serious financial commitments to meet.

A further reported effect of proximity to retirement age on customers' behaviour was a tendency to seek a minimal amount of work that would 'see them through' to receipt of a pension. How many hours were being sought, and at what rate of pay, depending typically on a range of financial factors such as whether mortgages had been paid off, whether a person had a partner who was working, and the extent to which a partner's earnings covered household living costs.

Because older job seekers often had a wealth of experience in their field of work, a common strategy was said to be settling for agency work rather than seeking full-time permanent employment.

*'A lot of older people seem to...get on with agencies...maybe sort of short-term – just ticking over until they reach 60 (or however old you have to be now to retire).'*

In addition, advisers reported the tendency for many of their older customers to say they wanted to 'wind down' their work in various ways: to reduce the level of responsibility (and stress) involved;

to cut down on travel time; or to reduce their hours if they could afford to do so. This perception by advisers was also strongly borne out in customer interviews for the research.

*'If they have had a high pressured job, a lot of the time they maybe see it [redundancy] as a turning point to do something a little bit different and maybe slow down a bit.'*

A wish just to 'tick over' in low-level employment during the last few years to retirement was widely reported. However, whether for reasons of changing economic circumstances, or changes to the proposed retirement age, more than one experienced adviser was of the opinion that such behaviour was less frequently seen among customers now than previously.

*'Traditionally, when somebody was 60...they'd have an entitlement to claim another benefit possibly without coming into the job centre. But that is changing. And of the customers that I have seen, [those] that have been 60 or 60 plus...have been the ones that have been most keen to get to work.'*

There was no evidence that the policy of extending working lives was something that advisers felt any particular 'ownership' of. Consequently, there was no indication that they felt any need to challenge the tendency of customers in their late fifties and early sixties to think about retirement. Indeed, getting customers to check on their National Insurance credits and State Pension eligibility was a routine part of dealing with customers in this age bracket. Many advisers felt that the mind-shift towards retirement was difficult to argue against, and one admitted to thinking somewhat differently about customers when they reached this age, perhaps reinforcing their feelings about the difficulty of re-entering the labour market.

*'I think [when] they're approaching pension age that's when I start thinking of them a bit different maybe, you know I ask them to do a pension forecast etc...'*

It is perhaps not surprising that adviser practice should tend this way. Current targets to which they work are primarily related to securing 'off-flows' from benefit, whether into work or not. Exploring the viability of retirement with older customers is a perfectly logical way of achieving such off-flows, particularly in the face of the real, objective difficulties of re-entering the labour market for many people at this age.

### 3.1.3 Sub-groups among older customers

Advisers identified a number of 'sub-groups' among the 50+. Customers presenting with different issues and concerns required the adviser to offer a range of appropriate courses of action or approaches. The groupings were based primarily upon customers' recent work and benefits histories, with a broad distinction usually being made between customers who were recently out of work following a long and continuous history of employment, and those whose history was mainly one of not working. The former were generally said to be well motivated and 'keen to get back into work' (though prone to set-backs when faced with the difficult realities of the labour market). The latter, on the other hand, especially those who had been claiming for a long time, were seen as much more likely to think they were 'never going to work again'.

*'I think a lot of people who come to us from work are really depressed, because they think that once they reach 50 they're not going to get another job – purely because of their age. Whereas I think the ones that have been on benefit think they've retired anyway!'*

Among customers with a history of not working were those trying to find employment after a long period away from the labour market, such as women post child-rearing, and those with backgrounds on a variety of different benefits. Customers coming to their current Jobseeker's Allowance (JSA) claim from other benefits included repeat claimants of JSA, either recycling within the system

or returning after a short period of employment, and those who had moved off benefits such as Income Support (IS), Incapacity Benefit (IB) and Employment and Support Allowance (ESA).

Examples given included: single mothers moving to JSA under recent changes to lone parent obligations as their youngest children reached an age which meant that they no longer qualified for IS; people who had been claiming IB as a result of recent health crises but who were now able to return to work; and those who had applied for ESA but been passed fit for work following a personal capability assessment and thus claiming JSA instead. None of these categories of 50+ customers was yet being seen in great numbers, although there was a widespread expectation of much greater volumes of such people flowing on to JSA from March 2011, as stocks of IB claimants were due for reassessment of work capability and migration onto either ESA or JSA.

Long-term claimants aged 50 and over were described as presenting the same sorts of challenges to advisers as other, younger long-term claimants. As with almost any age of customer, advisers were experiencing motivational problems among older claimants that derived primarily from the length of time they had been out of work.

*'A lot of it depends on how long they've been unemployed. [Up to] six months...they're still quite motivated...have still got a lot of experience...know what job search is...have their curriculum vitae (CVs). Most of them, if you ask them to do something they will do it. They are quite motivated. Whereas... someone that has been a long, long time unemployed, they're...not as motivated...because the drive to get work has kind of faded.'*

However, it was people who were recently out of work after a long and continuous period of employment who came most readily to mind when advisers were asked to consider the factors and circumstances that they saw as specific to, and hence largely defining of, the 50+ group. This focus was reinforced by undertaking the workbook and through familiarisation with the 50+ measures which had been designed in large part specifically as 'recession response' measures to help those who may have missed out on other support aimed at those suffering redundancy during the economic downturn experienced from 2009 onwards.

Older workers recently made redundant were seen as having particular problems to cope with relating to their age, their long work history, their experience of unemployment and their needs for support back into work. For advisers there was a particular urgency with this group of customers because they perceived one of their major disadvantages to be a lack of job-search skills – a central element in the adviser remit.

A further three key distinctions were made by advisers among these customers in terms of the types of occupation they had been made redundant from: skilled tradesmen; unskilled manual workers and labourers (particularly from factory work and the construction industry); and managers, supervisors and others with 'professional and executive' type career backgrounds.

Skilled tradesmen were particularly prominent among new JSA claimants in a number of areas. What advisers were finding was that, although these customers had lots of work experience and often knew they could meet skill demands, they were frequently lacking in the formal qualifications and the skills updating certificates now demanded by employers. The changed landscape within which they were having to look for work was causing many of them difficulties.

Advisers were also dealing with many unskilled manual workers laid off as a consequence of recession. In these cases a key issue to be faced was that the types of job that they were used to doing were disappearing, leaving them without the skills needed for most current vacancies.

*'There's a lot of them with no skills, they've done the same job, probably a manual job, something like engineering or the old type factory work, and now that's all gone. They've not got PC skills, they've not got selling skills, they've not got customer care skills, and that's why they're going to struggle.'*

The third occupational 'type' of customer mentioned by all advisers was that comprising of people made redundant from managerial and supervisory jobs. Almost by definition many who had been in this type of a job were more mature, and so fell within the 50+ designation. Again as a direct result of the recession, advisers were having to deal with unprecedented numbers of what have in the past been designated 'professional and executive' customers.

With many of these customers, the real challenge for advisers was seen as trying to bring them round to a realistic view of the kind of work available in the labour market. If they were unable to return to jobs similar to those they had previously been doing then the aim ultimately was to bring them to face the need to lower their sights (and usually their pay expectations too).

*'The ones that...have been made unemployed because of the recession...they've already got skills, and they're highly qualified, and that has been a bit difficult, because you've got people who aren't really prepared to take a lower paid job...and that is hard – trying to encourage them to look for something that's not management.'*

## 3.2 Customer strengths and weaknesses

Customers aged 50 and over were perceived as having a mixture of strengths and weakness. Advisers cited the following as being key strengths:

- extensive work experience;
- transferable work skills;
- 'life' skills;
- being very job focused and job ready;
- with a strong determination to find work; and
- often a strong financial imperative to do so.

These characteristics generally made 50+ JSA customers a rewarding group for advisers to deal with. They tended to be a group with whom they could spend most of their time on the positive aspects of support, with less need to spend time on warnings about the requirements of signing on for JSA and the conditionality attached to receipt of this benefit.

There was recognition, however, that older customers could also display a number of weaknesses, which presented advisers with particular challenges in trying to help and support them back into employment. Some of these factors, including low self-confidence, poor basic skills and lack of qualifications, were shared with many job seekers of other ages and far from limited only to the over 50s,. However, advisers also identified weaknesses which they felt were concentrated among, or specific to, the over 50s. A great many of these more specific weaknesses were related to people having been in long-term employment prior to their recent job loss, and thus never before having been in the position of looking for work under the conditions of today's labour market. Prominent among them were said to be the following:

- Often being set in their ways with work.
- Not always recognising the transferability of their skills.

- Having unrealistic wage expectations.
- Lacking formal ‘paper’ qualifications or current skills ‘tickets’.
- Having work skills within a shrinking sector or for a type of job that no longer existed.
- Being unfamiliar with IT and especially with using the internet to search and apply for jobs on-line.
- Lacking job-search skills and a CV.
- Being unfamiliar with a culture of regular job-changing.
- Feeling uncomfortable with a culture of self-promotion.

In addition to identifying these factors, advisers pointed to a number of additional weaknesses which they saw as deriving specifically from customers’ more advanced age:

- Not wanting to spend time at the Jobcentre Plus office due to embarrassment at their situation.
- Being unwilling to ask for help and feeling they could ‘go it alone’ especially in the earlier weeks of a claim.
- Suffering from increasing health limitations on what they felt they could do in a job.
- Looking to ‘wind down’ their working lives (but without necessarily having taken stock of the wage drop this would entail).

Some of these perceived weaknesses among 50+ customers could, advisers thought, potentially be addressed through appropriate training and specific ‘technical’ support, such as with CV building and help using the internet. However, the majority point to the many influences on the state of mind of customers, and emphasise the need for advisers to challenge perceptions and tackle these ‘mind-sets’ if they are to be in a position to help people engage productively with the processes of moving back into work.

### 3.3 Barriers for the 50+

While primacy was generally given to the ‘subjective’ factors causing potential difficulties for older customers, all advisers agreed that there were also important ‘objective’ barriers for many to overcome. These were said most importantly to include:

- health problems;
- adult caring responsibilities;
- wage expectation linked to financial commitments;
- age discrimination and employer prejudice.

#### 3.3.1 Health barriers

Older customers were reported as being more likely to start to feel their health to be imposing limitations on what they could do in work. This was mentioned particularly in relation to those used to doing manual or physical jobs, such as labouring and construction, but was not limited only to these types of customers. Advisers noted that in many cases health conditions posed an additional barrier once someone was out of work. Whereas limiting health conditions that had often developed whilst in a job had often hitherto been effectively accommodated or ‘worked round’ by employers, they presented a rather greater hurdle to re-entering employment, particularly when customers were competing for vacancies with younger job seekers. Advisers were aware that such health problems could potentially undermine even a very good work record.

### 3.3.2 Family caring responsibilities

Although advisers mentioned that their 50+ customers sometimes had caring responsibilities for grandchildren, parents or elderly relatives, and even for partners with poor health, it was generally said to be the case that people managed to accommodate these responsibilities. Caring presented some issues regarding hours and travel, which needed to be taken into account, but was not felt to be, in itself, preventing a lot of people from finding work.

### 3.3.3 Financial barriers

A greater barrier – or at least a more evident one – was said to be the pressure that many 50+ customers were under from their financial commitments, leading to unrealistic wage expectations in the context of the local labour market. Whether this was because of mortgages, other debts, the prospective cost of funding children through university, or just the level of normal outgoings on household expenditure, food, heating and lighting, for many this pressure was meaning that available jobs at available hours and pay rates were not seen as sufficient.

*‘Some of them...when they’ve been made redundant...they find it really difficult to think of going for a job at national minimum wage.’*

Without help from pensions or the earnings of a partner, the prospect of taking a job at a greatly reduced level of pay from what they were previously used to meant that many were facing a serious drop in their future living standard. For advisers such situations required considerable sensitivity and were clearly often very difficult to handle. The problem was said to be accentuated by the fact that many of the jobs available with explicitly ‘age positive’ employers, who were seeking out older potential employees, were in low paid sectors such as retail, often for part-time hours and frequently at the minimum wage.

### 3.3.4 Age discrimination

The last of the key barriers highlighted by advisers was age discrimination. Despite legislation making it illegal for employers to make hiring decisions based on age, it was widely felt that, even if not made explicit, such discrimination was common and widespread. Many other factors were acknowledged to come into play in recruitment decisions apart from simply who was the best candidate for the job. Particularly prevalent were said to be concerns over the length of return on training investment in older workers and the higher cost of wages.

*‘My experience is if you have got two people who are both going for the same job, and you’ve got somebody who’s 50 and you’ve got somebody who’s twenty, nine times out of ten the company will go for the twenty year old because they’re not going to cost as much money... [but] you can’t prove it because there’s supposed to be no discrimination.’*

The great majority of advisers said that it was very common for their older customers to express some sense that they were being discriminated against because of their age. Furthermore, if this perception of being hindered by their age was not their reaction when first out of work, it was something that was often seen to emerge over time. When people had been trying unsuccessfully to find a job for several weeks or months, they started to look for reasons and explanations for the difficulty they were having and frequently blamed prejudice against their age.

The common customer experiences of applying to many jobs, failing to get interviews for the vast majority, and getting no feedback from employers on failed job applications, was thought perhaps to allow such suspicions to take hold particularly easily. However, in an increasing number of instances, very few applications were actually getting through to the employers themselves because they were being ‘filtered’ on behalf of employers by recruitment agencies. For advisers, this placed a

particular importance on getting advice for their customers on how to produce good CVs. Many felt that their older customers had real strengths that would show to their advantage if they could get face to face with an employer, and were frustrated on their behalf that they frequently could not get this opportunity.

*'A lot of [customers] you see are really, really good, they just need the face to face interview, and whether we like it or not, employers do discriminate if they know your age. So it's taking off the [age] pointers, and I say to them, 'you don't have to put your date of birth on'. And a lot of them don't realise that.'*

Whilst advisers generally accepted that there was age discrimination going on, not all were convinced that this was the biggest problem facing older customers. Many saw the greatest barriers that they had to try to overcome as emanating from the customers themselves; their attitudes and perceptions and expectations.

I don't think the biggest barrier is coming from employers, I really don't.

### 3.4 Key findings

- Advisers showed a good understanding of the 50+ customer group and were generally confident that they were able to recognise and meet the needs for support into work that they might show.
- Advisers testified to the great diversity and heterogeneity of the 50+ customer group, and to the essentially arbitrary nature of 50 as an age cut-off defining a distinct group of customers – 55 was seen by many as a more defining age 'watershed'.
- Age was not automatically treated as an issue, and not flagged as a problem unless already seen as such by a customer.
- Perceived proximity to **State Pension Age** was seen as a prominent feature affecting the way 50+ customers thought about work, though there was some evidence reported that people may be beginning to think about working longer.
- Many older customers were said to be looking to 'wind down' their work in terms of hours, travel and stress.
- Many advisers felt that this mind-shift towards retirement was difficult to argue against and that there were no obvious incentives to keep a customer seeking work if their inclination was to sign off.
- Customers with a long and solid history of working prior to a recent redundancy were seen as the key 'sub-group' within the 50+ and as being defining of the group as different from other ages, whether from unskilled manual backgrounds or trades, or from managerial and supervisory work roles.
- As well as barriers such as ill health, high wage expectation, and employer age discrimination, the 50+ were seen to face an important set of challenges deriving, ironically, directly from the strength of their previous work record.

## 4 Delivering the 50+ measures

This section explores in more detail the experiences of advisers in delivering the new 50+ measures to customers. The key elements of the context within which the measures sit are identified and the operational implications of engaging with customers within the framework of JRFND are set against the 'time line' of the customer's Jobseeker's Allowance (JSA) journey. Aspects of the adviser remit are looked at in the light of the new 50+ measures, including their experiences of making referrals to external contracted and non-contracted provision. Finally, advisers' experiences of undertaking the three new measures with 50+ customers (early work trials, extra interview time and fast-tracking to JRFND Stage 3) are looked at in turn.

### 4.1 The delivery context

The new help and support measures for JSA customers aged over 50 were introduced on the premise that this group of job-seekers faced additional difficulties and disadvantage when trying to re-enter the labour market, and the recognition of its potential importance to the government policy of extending people's working lives. The measures aimed to get extra support to older job-seekers and to get that support to them earlier in the course of their claim than would previously have been the case. Implicit in the 'accelerating' nature of the measures was the concern that allowing the normal processes of JRFND to unfold as previously could risk jeopardising the longer-term success that Jobcentre Plus might achieve in getting customers over 50 back into work.

The measures followed the pattern of support for other disadvantaged groups, and were thus essentially familiar in concept to advisers. Advisers were used to the idea of fast-tracking disadvantaged customers to more intensive levels of support, to providing more adviser time to those with the greatest demonstrable need, and to making elements of support provision and incentives, otherwise reserved until the 26 week point of a claim (the six month offer), available from 'day one'. In this sense the new 50+ measures fitted unproblematically with the existing practices of JRFND.

However, the very general nature of the group at which the measures were aimed – all people between the age of 50 and retirement age – meant that it was particularly heterogeneous. There was a greater likelihood that the 50+ group would include widely different types and levels of support needs, compared to much more narrowly defined disadvantaged groups such as, for example, ex-offenders or drug and alcohol users or those with limiting health conditions. Thus, while eligibility for the measures was defined universally by age, there was a further crucial process of assessment and identification of needs that was required in order to target available support effectively.

To a greater degree than with other disadvantaged groups, those aged 50+ could not be assumed automatically to have greater support needs than others solely by virtue of their defining characteristic, age. Older customers were therefore required to show those extra needs (for example by expressing worries about their age and concern about employers' perceptions of their age) or to demonstrate those extra needs (primarily through the length of time they remained on the JSA register and failed to secure employment).

## 4.2 Timing of support interventions

There was general agreement among advisers that the earlier customers' needs for support could be identified the more responsive they could be in meeting them. As JRFND currently stands, the main point for such an assessment to be made is envisaged as being at the review meeting with an adviser at the start of Stage 2, thirteen weeks into a claim. Prior to this customers' contact with Jobcentre Plus is almost entirely just with 'front-line' signing on staff, although they would also attend a group session run by an adviser at six to nine weeks into their claim.

A few advisers suggested that more might be done by way of support needs assessment in these early weeks, and even at initial new claim interviews, although it was acknowledged that a lot of administrative detail had to be dealt with which left little time for more in depth exploration of issues with individuals. Pressure of time was also given as one reason why fortnightly signing on sessions offered little scope for staff to respond to the questions and concerns of customers. Although a customer could be referred to a meeting with an adviser at any time, this was said to happen only rarely.

### 4.2.1 Unpredictable timing of support needs

A further complicating factor making the timing of needs assessment problematic for advisers, was the unpredictability of customers' psychological journeys through the experience of unemployment. While there were undoubtedly some older customers who advisers felt would have benefited from much earlier support, even from day one, there were equally many customers for whom the opposite was true, and who needed a time of reflection and adjustment to the realities of their situation before they become responsive to help.

The 50+ customer group was described as containing many people who had been made redundant from a lifetime of work, and who at the start of their claim were fully confident that they would soon find work again. Because of this, many were said to feel that they did not need or want help initially, and it was only after several weeks or months that, with the loss of their early optimism, they started to realise that they needed help and were willing to seek it from an adviser.

### 4.2.2 The week 13 review interview

This combination of administrative circumstance and great variability of need among customers led most advisers to conclude that the week thirteen review interview was indeed in practice the earliest point at which a full support needs assessment could be made for most customers. But even this point was said to be too early in many cases. Several advisers were of the opinion that a far more significant moment for many claimants was at twenty six weeks, and entry into Stage 3 of JRFND. The main argument put forward to support this view was that it took most customers this long before they fully realised that what they were doing in the way of job-search was not working and became open to suggestions as to how they needed to transfer their skills to other job applications, broaden the basis of their search, and in all probability lower their sights and their wage expectations.

A tension thus existed in the minds of many advisers between the desire to provide early support to their customers to prevent any slide into long-term unemployment and associated feelings of depression or resignation, and the recognition that in many instances customers were not fully receptive to help and support until several months had passed. This can usefully raise questions as to whether some customers might be identified as needing help earlier than the thirteenth week review. However, it also highlights the fact that for many others it is only really productive to engage them in Stage 3, by which time the new support measures cannot add anything to that which customers are anyway entitled to at twenty six weeks.

## 4.3 Advisers' remit

Another important dimension to the context for the new measures, which emerged from interviews, was the extent and nature of the remit for help and support that advisers actually had within Jobcentre Plus.

Within the increasingly 'streamlined' model of operations, of which JRFND is a part, the remit for advisers has focused down onto four key activities: motivation and engagement; job-search help; enforcement of conditionality; and signposting and referral. Looking at each of these elements in turn throws some light on how advisers responded to and enacted the 50+ measures.

### 4.3.1 Motivation and engagement of customers

Many of the 50+ customers, especially those recently in a job, were said already to be highly motivated and focused on getting back to work. The challenge for advisers was thus not so much getting customers to engage with job searching as to get them to engage with the process of help and support available, and to prevent set-backs from engendering disillusionment and resignation. Customers early in their claim were often convinced they needed no help and would soon return to employment. An embarrassment at their situation, and uncomfortableness at having to attend a Jobcentre Plus office to access adviser help, frequently reinforced this 'go it alone' attitude and meant that customers spent as little time as possible there.

Even once talking to an adviser, the process of acknowledging a need for help was often a slow and painstaking one. An understanding was required from the adviser of the attitudes, perceptions and 'mind-sets' of customers in order to be able to move them eventually to a recognition that there might be help they could benefit from, and also to an acceptance that the realities of the jobs market might mean they had to change their goals and lower their expectations in order to engage effectively in job-search. While advisers felt they could facilitate moving people down this path they also accepted that often it was necessary for a certain period of time to elapse to allow customers to adjust to their situation.

In trying to engage and motivate customers, advisers spoke of various 'techniques' for mapping the route they were to take, using action plans and appropriate external provision as goals and markers along the way. Having such interim goals and milestones was seen as essential given the objective difficulties in the labour market and the lack of ready availability of suitable jobs.

### 4.3.2 Job-search support

Help with job-searching was also an on-going and important part of the adviser remit. At its simplest this was said to involve on-screen searches for vacancies and the encouragement of a wide range of job applications. With much higher level job-search there was often little that advisers could add to the efforts of customers who knew all key websites and other sources of possible vacancies often better in their own field than an adviser could. This reinforced some customers' sense that Jobcentre Plus had nothing to offer them in the way of help and support. Advisers, however, saw their key role with these customers as coming further down the line when several months of unsuccessful job-searching could change customers' perspectives, expectations and indeed affect their mental state and their commitment to finding work.

A very similar challenge then was said to face advisers also in this aspect of their work. The 50+ customer group contained a high proportion of experienced and often well qualified people who had been working in higher level managerial and professional roles, as well as in skilled trades, who were often resistant to broadening their job-search beyond that which they were familiar with. A key role for advisers was seen as being the identification of transferable skills to help broaden out people's job-search.

### 4.3.3 Broadening job search

The broadening of job-search was a major aspect of Stage 2 under JRFND, once three months had gone by without a claimant being able to find a similar or comparable job to the one they had been made redundant from. The process of looking at a wider range of possible job options generally also entailed coming to terms with the unpalatable likelihood of having to take a major drop in wages and having to start at a much lower job level than previously and work their way up again.

Resistance to this was seen to diminish over time, with people getting to the point where they were willing to take almost any job available. However, in the most difficult cases, where people had no financial 'back-up' to lower wages and where a major change to their lifestyle would be entailed, the adviser's job remained very difficult as the carrier of 'bad news', and from this point they had to try to manage customers' frustration, anger and depression.

### 4.3.4 Key role of help with CVs

An issue specific to the 50+ customer group, and their job-search and job application activity, was the need for the production and use of appropriate and effective CVs. This was seen by advisers as critical in today's recruitment market, and something of which those who had been in work for many years had little or no recent experience to draw upon. Most advisers were aware of the need for older customers not to put their date of birth on their CV, nor for them to include all their work history and other information that would make their age all too obvious.

Paring down CVs to include only key items of information suited to each job was seen as essential if CVs were to achieve their main purpose – getting customers to interview, where they could demonstrate their many positive qualities face to face. Advisers felt competent to deal with their customers' CVs to varying degrees, but even those with lengthy experience and considerable confidence in this area said they had limited time to do so and tended to prefer using an outside contractor for this customer support, seeing a need for the input of specific expertise. They also saw advantages in making a referral to a contracted provider for CV building and advice because of the way this could structure a customer's progress and provide goals and talking points for subsequent adviser meetings.

### 4.3.5 Enforcement of conditionality

An important part of the adviser remit was to ensure that all customers understood and complied with the conditionality of claiming JSA. This part of their role was the most likely to occasionally generate friction with customers, and some advisers felt this particularly to be the case with their 50+ customers. In general older claimants, and especially those recently out of work, were considered well intentioned and well motivated to find work. For this reason the routine stressing of claimant obligations, such as at 'back to work' group sessions six to nine weeks into a claim, were felt to be inappropriate for most of the over fifties, and potentially counter-productive in terms of any future support work that might be needed, particularly at the point when initial optimism faded and disillusionment could threaten customers' commitment.

With the 50+ customer group, drawing attention to conditionality, obligations and potential sanctions was felt to reinforce feelings of not belonging in the Jobcentre Plus office along with other jobseekers and to further alienate these customers from seeking help. In the case of customers within a few years of retirement age, there was seen to be a real danger of driving people off the register into economic inactivity. This may in part explain findings from other research which showed advisers systematically treating older customers with more of a light touch in respect of conditionality than younger customers. Evidence from our interviews suggests that for many advisers this would be seen as a rational and justifiable approach given the particular situation and sensitivities of the 50+ customer group.

### 4.3.6 Signposting and referral

It is not part of the adviser remit to deliver training or other support services to customers. Such help is delivered by external contracted providers or by independent external organisations. Even in the 'grey' areas of confidence building and CV writing most advisers accept that their expertise has a limited extent and that they are not specialists. With the introduction of the Work Programme (which will replace Flexible New Deal (FND)) this model will continue. Jobcentre Plus aims to offer flexible and personalised back to work support where advisers will have greater discretion in the timing, duration and format of support interventions based on an assessment of customer need.

Advisers were generally happy with this set up and considered it a sensible approach. Having provision that they could direct customers to as appropriate was seen by most as a valuable support to their advisory role and as something tangible that they could offer which would help motivate customers and be seen by them as meeting specific needs. Available support provision gave advisers something to work towards. Their main concern was that there was not always available sufficient provision of sufficient quality to work in this way. The original proposal for bespoke provision for 50+ customers was eagerly anticipated in most quarters because it was expected to fill a very specific gap in need and demand, and also to provide a goal that 'validated' the extra adviser support to those with age-related issues and barriers.

*'If someone is having real problems with something, to be able to refer them to specialist help ... would give me confidence, because then when they come back to me, there is something else there to work with.'*

Advisers felt that specialised 50+ courses would have provided something 'tangible' they could offer that went beyond their usual advice sessions and could more easily be seen to justify the designated extra or more intensive support that was being promoted to customers.

## 4.4 External provision

The final element of the context in which the 50+ measures were being delivered, therefore, was the configuration of external support provision to which advisers could refer their customers. Above all, this comprised the general Support Contract provision contracted for all JSA customers aged over 25. However, in addition to the general Support Contract there were a small number of additional providers available in some areas to which customers over 50 could be referred, and some of these were providing age-specific support. This 'non-contracted' provision, based in local authorities and in the voluntary sector, and run out of venue such as libraries and community centres, was greatly appreciated by advisers though they admitted that it could be hard work keeping up to date and in touch with what was available locally at any given time. Even in areas relatively well provided for, the feeling among advisers was that they needed more, and preferably more 'tailored' provision for the over 50s.

*'What is there out there to actually help people? There's not enough, as far as we're concerned there's not enough.'*

### 4.4.1 Non-contracted provision

The most widespread non-contracted provision was made available through local authorities. This was either specifically as part of employment support, as with Access to Employment in Scotland, or run as part of Careers Services. The types of provision on offer in the areas visited included:

- computer courses;
- guidance on CV writing;

- recruitment events;
- employment workshops.

In South Wales there appeared to be some additional funding being made available through the Assembly and European Social Fund. Provision funded in this way included the Genesis programme, targeted on disadvantaged jobseekers (especially women) including the over fifties, and a skills analysis pilot delivered through the Careers Service. The skills analysis pilot was aimed at identifying transferable skills and broadening job-search, and advisers had received very positive feedback on it from 50+ customers.

By no means all of this provision was specifically targeted on those aged over 50, nor necessarily tailored solely to their needs, however advisers felt that it was often delivered in a more '50+ friendly' manner than the more constrained Support Contract provision. In particular, there was frequently said to be less pressure of numbers on these services and this allowed them to be delivered on a more personal, one to one basis – a mode of advice and support delivery widely said to be favoured by older customers.

*'I think it's good because it's on a one to one basis and you know a lot of the customers in the 50+ group I think prefer one to one because they're not sitting in a classroom...they're not having to mix with [other] customers from the job centre...that they think...they're different from.'*

There was also felt to be a considerable advantage to having advice services and provision delivered away from the Jobcentre Plus office and away from other, younger job-seekers. Many advisers testified to a common feeling among their 50+ customers of being different from other unemployed people and warranting different treatment. As a result older customers were reported to respond better when away from Jobcentre Plus venues and those of contracted providers.

There was some provision specifically designed for the over 50 age-group, most notably that run by the charity Age UK. The training arm of Age UK had a resource and advice centre for the over fifties in one of the districts on Merseyside, with well-established links into the local Jobcentre Plus office, which was making good use of its dedicated provision.

### 4.4.2 Support Contract provision for all 25+ customers

The general support contract in each district provides contracted services to Jobcentre Plus for all their customers aged over 25. The contract can be with one organisation, or more typically several, who take people on referral for any of a range of support courses and workshops, delivered either on a piecemeal basis according to what customers say they need or in a package of activities aimed at giving general support to people job-searching. Typical activities include CV preparation, job-searching, confidence building and interview skills development, along with basic IT and internet familiarisation in some areas.

While most older customers were reported to be generally happy with support contract provision, advisers varied in their assessments of the training and help provided under their local support contract. Most agreed that it was a useful 'first port of call' and that it provided material that they as advisers could review and go on to discuss and work with further with customers. However, many had serious reservations as to whether the contracted provision was sufficiently focused around the particular difficulties faced by those over 50, and there was widespread demand for some more 'bespoke' training geared specifically towards these older customers.

*'I haven't got confidence in the support contract anyway – I think it would be nice if there was a specific module for the over 50s.'*

### 4.4.3 Demand for a more 50+ friendly mode of delivery

Many advisers were concerned that the mode of delivery of the provision was limiting its value for their 50+ customers, being typically in group workshop format, involving participants of all ages and including both voluntary and mandated job seekers. The most frequently mentioned problem was the mixed age range of sessions, with some older customers telling advisers that they felt intimidated by this. Others felt they had been unable to pursue the issues they would have liked to because of the presence of others who they perceived not to be serious about their job-seeking. The idea of delivering the support provision individually, or to smaller groups comprising only older customers, was favoured by many advisers, especially for those customers with self-confidence issues.

*‘[One customer said] she was put off by the fact there were a lot of young people there, and... she felt uncomfortable, even though she thought the content was good.’*

A key factor in thinking that this might be preferable was the concern that in mixed groups it was going to be much more difficult to judge an individual’s needs and to respond to them appropriately. One experienced adviser, comparing the set up of provision now to that of several years ago, also thought that it had become more difficult for advisers to talk to providers about individual customers (and indeed that they were discouraged from doing so) and that this increased concerns that generic provision could miss a person’s specific needs.

In line with the above mentioned concerns about the provision of help to the 50+ under the general support contract, it was examples of innovation and variation in delivery that were singled out for praise by advisers as being more suited to the preferences and circumstances of older customers. Provision that involved more individual attention, and modes of delivery that gave customers some choice over how they accessed support, were said to elicit a particularly favourable response.

*‘[Our] support contract is different, it is only a small office, and one part of it is the training, the other side is the job-search support centre, and you’ve got four computers and time slots, so... there’s only ever the adviser there and four people and they’ve got access to whatever...’*

In more than one area it was said that moves were already afoot among support contract providers to explore the options for modifying existing services and exploring the possibility of future specialist 50+ provision.

### 4.4.4 Professional and executive support services

Perhaps the nearest thing to bespoke provision that was available under the support contract was the ‘professional and executive’ support service that was on offer in most (but apparently not all) districts. Because many who came under this designation tended on average to be older, this provision was said to be well received by the 50+ customer group. Typically, professional and executive support took the form of a one day course delivered away from the Jobcentre Plus office, e.g. in a local hotel. The content was similar to that often provided by larger companies when making redundancies and sessions were run by outside consultants. Because older customers responded well to these courses, some advisers said that they were able to address quite a wide range of issues through them, whereas other provision was likely to be resisted. Again, the more one to one delivery style and greater choice over what to access, were mentioned as important positives for 50+ customers.

*‘...[perhaps because] you’ve got an adviser, it’s a one on one service, and I suppose it’s up to you how much of the service you want to use.’*

### 4.4.5 Even greater need for bespoke provision in the future

The lack of specialist provision for those 50+ customers who had not come from a professional and executive employment background was generally thought to be a significant shortcoming of current arrangements. Advisers expressed a wish for something ‘tangible’ that they could refer people to. The proposals for two bespoke 50+ modules, which were not eventually put into place, had in many cases raised advisers’ hopes and expectations.

*‘They were going to do special classes for people...that thought age was a barrier to them getting work. I think there is a special support needed for people who are 50 plus.’*

It was also noted that the specific (and complex) issues of the 50+ customer group were likely to become even more accentuated in the near future, increasing the need for provision that could deal specifically with those problems.

There were a few dissenting voices from the general wish for age specific delivery of support modules. One adviser, for example, speculated that groups made up entirely of the over fifties could perhaps reinforce feelings that it was primarily age that was the problem – a perception advisers were elsewhere trying to counteract.

*‘You could say if you did a support session for just people of that age, they’re going to think they’re in the minority, whereas if you were just doing a general support session, they’re going to know that a 30 year old and a 40 year old is having the same problem as them. So they think well it’s not just because of my age you know.’*

## 4.5 A low profile for the 50+ measures

Across all the districts visited in the research, in England, Wales and Scotland, advisers spoke of the new 50+ measures as having a low profile and not being greatly in evidence in most offices, most of the time. While the great majority (but not all) of those spoken to knew what the three measures were, they did not perceive them to be high among their priorities and individually they had limited experience of using any of them or of dealing with customers who had taken them up.

This is not to say that advisers were unsympathetic to the idea that older customers had particular issues that warranted special attention and a different treatment to younger customers. Many thought the over fifties did require a somewhat different approach, and that they needed ‘to talk to them in a different way.’ The difference in approach that was envisaged was central to the core adviser role, relating as it did to interpersonal and interviewing skills. Although this was effectively picked up in the 50+ training advisers had received, it was not felt to be directly addressed by the measures themselves.

In addition to this, the over fifties were not seen to form a natural grouping for advisers and so eligibility for the measures (by age) was rather obscured. Several advisers admitted that they could not say for certain which of their customers actually did fall within the 50+ age group. While acknowledging that by treating the 50+ as disadvantaged purely because they were over 50, and for no other reason, the measures were doing something new and were drawing attention to these customers, advisers remained for the most part sceptical of the idea that the 50+ were universally disadvantaged. Many remained unsure whether they were indeed expected to approach their customers on this basis. In practice, they continued to focus on individual need.

Several other explanations were put forward for the low levels of activity around the measures and their lack of visibility, including poor demand from customers for work trials and fast-tracking and the low key manner in which information about the measures had been communicated to advisers.

The cancelling of the proposed bespoke training modules in July 2010, which had formed part of the original plans for the 50+ measures, was the most frequently raised reason for the low application of those that remained. So strong was this feeling that the measures only made sense as a 'package' that some even thought that withdrawal of the training modules had actually signalled withdrawal of all the measures and that as a consequence there currently were no 50+ measures actively in place.

The decision not to set up these 50+ modules within support contracts was felt to have undermined the purpose of the remaining measures and largely removed the *raison d'être* from at least the extra interviews and the fast-tracking options.

*'I think if we'd got [the support modules] you would have then been more conscious of the customer's age, because then you would have focused your interview knowing that you could probably get them booked on this module. You would then have probably felt as though you'd got something to offer them.'*

Above all it was not having an 'end product' to offer customers, and not having a potential referral to work towards, which diminished the value of the remaining measures in advisers' eyes. The possibility of an external referral was seen as the most effective way of making customers feel that they had made progress and achieved something – giving a vital boost in many cases to flagging self-belief.

Importantly, not only did advisers perceive that many of their 50+ customers were well motivated and experienced and did not need extra help and support, but they were also adamant that the customers who had the greatest need of help could get it anyway and without the new measures being needed. All these factors appeared to be contributing to a low profile for the measures, and helped explain why they were often difficult to distinguish from among other activity with 50+ customers which was being conducted in similar fashion after the measures' introduction as it had before.

## 4.6 Work trials

Most advisers saw work trials as generally a good idea and were clear about what they saw as the positive aspects of them. Above all they were seen as effective in securing jobs for the people who took part in them. A few were extremely enthusiastic, especially if they could recall customers of theirs who had benefited in the past, and said that they got very positive feedback from their customers about them.

*'I think work trials a fabulous way of doing it...it gives [employers] a chance to have a look at one of these people, where they might not have considered them in the past. I think it's massively important.'*

Some offices reported having had targets for achieving work trials in the past, though none did any longer. In fact, in several districts the feeling was that work trials were no longer available except in exceptional circumstances, and had in effect ceased.

### 4.6.1 Work trials no longer being promoted

In two districts, advisers reported that they had been given recent instructions by their managers not to 'promote' or 'sell' work trials to customers any more. Where previously they had given information sheets out to customers, and letters about work trials to include with curriculum vitae's (CVs) when applying for jobs, they had since been told only to deal with work trials reactively, if the issue was raised by a customer after they had secured a job.

*'Work trials are only to be used [in this office] if somebody has already been offered a job, and any doubts still exist between employer and customer, at that point a work trial can be used, but we've been told not to promote, not to sell work trials at all. So again, that's another one of the measures that no longer exists.'*

The perceived move away from work trials in these areas was seen as having effectively removed one of the 50+ measures because there were no indications that they should act differently regarding work trials if a customer happened to be aged over 50. This was regretted by some advisers who, like colleagues in other districts, said they thought work trials were particularly appropriate for use with this customer group.

### 4.6.2 Work trials particularly suited to 50+ customers

The suitability of work trials for 50+ customers was seen to lie in the opportunity they offered to demonstrate to employers that they were capable of doing a job and to allow them to show that they had skills for which perhaps they did not have formal qualifications as proof. Many 50+ customers were also said to be lacking in confidence in new areas of work after being in the same job for many years; work trials were seen as a good way of giving people confidence and letting them 'try out' new areas of employment at low risk (because they could return to benefits with no penalty if they decided against a particular job).

Several advisers also liked the fact that work trials were one of the few occasions where they could actively take on an advocacy role and talk to an employer about the qualities of a particular customer.

*'If a customer is lacking in confidence, but has a good skill set...then the good thing about work trials is we can act as the customer's voice.'*

### 4.6.3 Weak demand from customers

Despite being convinced of the value of work trials, however, advisers acknowledged that 50+ customers were not always particularly keen to take them up. In one district in particular advisers felt that their older customers were highly resistant to the idea of working while only receiving benefits. Many older customers were said to view work trials in this light as 'working for free'. In other districts there was not felt to be the same level of feeling among customers, although more than one adviser said they thought there was greater resistance to work trials from 50+ customers in the early weeks and months of their claim. This was because they still generally believed at this stage that they would soon be back in paid work. Receptiveness to work trials (as to other aspects of support) was said to increase thereafter.

*'I know the 50+ can access [work trials now] from day one, but the few that I discuss it with don't seem overly receptive...On new claims I could get somebody to work trial, but generally you're not going to get much of a response [then].'*

Perhaps for this reason, the new element of the 50+ work trials (access from day one) was not widely seen as adding a great deal to what was previously available. Many advisers continued to treat work trials as a useful option in Stage 3 JRFND, rather than earlier.

There was a strong sense with many advisers that a work trial was a measure that could most effectively be brought into play as a 'back-up' after a customer had suffered a period of unsuccessful applications and rejections. At this stage a work trial was seen as one possible way of getting 'an edge' for a customer who was otherwise not gaining employers' attention for whatever reasons.

#### 4.6.4 Length of work trials

Those advisers who had recently referred customers onto work trials reported that they generally lasted for no more than one week, and in exceptional circumstances (such as when trialling jobs with complex shift patterns) up to three weeks. In the great majority of cases, work trials were undertaken by a single individual to test out a single job vacancy. However, there was another, 'competitive' model described in one district whereby more than one candidate would be 'work trialled' by an employer and one of them selected for the job at the end of the trial period. This use of work trials as a form of recruitment sifting mechanism was said to be used particularly with small employers local to the area served by the Jobcentre Plus office who lacked the resources needed to undertake a full recruitment process and were able in this way to benefit from Jobcentre Plus making an initial selection of suitable candidates for them.

#### 4.7 Extra interview time

The provision of extra interview time for 50+ customers was perceived as being useful on an individual by individual basis, and an effective tool for advisers to use to re-engage them and to demonstrate support. Many older customers were said to be very keen to have such extra input.

*'They will kill for it! It's somebody saying come on, yeah you've got problems, we want to do something about it. They're really up for that, they want someone to help them and they will go with that.'*

Advisers, however, were rather more cautious – wanting to be sure there was a real need and that the extra time could be used for additional input rather than just more of the same jobsearch activity. In addition to its motivational value, advisers gave the following reasons for why they might suggest to a 50+ customer that they have an extra interview with them to:

- help gauge where extra help may be needed;
- provide a second opinion on what a customer might benefit from ('a fresh pair of eyes');
- address particular issues with a customer when perhaps previous, routine review meeting time had not been long enough or had been too much taken up with 'paperwork and process'.

##### 4.7.1 The timing of extra interviews

The timing of extra interviews was felt to be crucial. While a general eagerness to discuss issues was noted among 50+ customers, it was also said that (as with work trials) many people were rather less keen in the early stages of their claim, whether through a general embarrassment at the idea of seeking help or through the belief that their unemployment would be short-lived. One adviser, in response to this, had tried offering extra interview time on the basis of 'get back to me if you are still out of work in a month's time', with some success.

##### 4.7.2 How additional was the 'extra' adviser time?

There was an apparent problem of perception regarding the measure, in that many advisers struggled to see it as being genuinely 'extra' within the context of usual practice at their offices. In their view the availability of review meetings and case-loading possibilities even in Stage 2 of JRFND meant that those customers in need of more support would be able to get extra adviser time in any case. Introduction of the measure was not seen as having made a difference to how adviser time was allotted, nor how advisers viewed and dealt with 50+ customers.

*'I can book an appointment, they can have an appointment with me at any time...anyone can ask for an interview with me, an 'additional interview' doesn't mean anything really...because anyone can have a one to one interview.'*

Clearly extra interviews could be booked and recorded under a number of different 'types' and this had resulted not only in obscuring the measure within administrative data but also in the minds of advisers.

*'I've got to say, I don't think anyone has ever been booked in for a 50+ additional interview [in this office], and I don't think anyone thinks about it, because other types of appointments can be booked in.'*

Certain kinds of discussion with customers were dealt with in routine fashion in many offices, and this practice had continued unchanged since the introduction of the new 50+ measures in April 2010.

*'It could be that they would just have a chat about training, so we would just book a normal non-caseload interview rather than doing the 50+ additional interview.'*

Again, considerable emphasis was placed on the specific needs of individual customers. Time was being made available to meet that perceived need, and advisers did not think in terms of a rationing out of their time on any other criteria.

*'If you feel that a customer needs another appointment, you'd book it, you'd not treat it as like "you've had your quota"...'*

### 4.7.3 Other time constraints

Overall, therefore, advisers felt that they already had sufficient flexibility to give customers extra interview time where they deemed it necessary, and that the introduction of the 50+ specific measure had not made an evident difference in practice. The real constraint upon this flexibility was felt to be the absolute amount of time available in advisers' diaries. At some offices it was felt that the pressures on time were easing slightly compared to a year previously, and that 'where there was a will there was usually a way'.

*'If I feel a customer needs a little bit of extra support...I'm quite happy to mix my diary around and fit them in and see them.'*

It was not possible, however, to ascertain from interviews with advisers whether aggregate staff time allocation had been affected by the new measure. It had been part of the planning intention that the extra adviser time would be effectively 'ring-fenced' for use with the 50+ customer group and would thus result in the allocation of more resource to older jobseekers. There was no evidence at adviser level that any such re-allocation was taking place.

### 4.7.4 Assessment of need for extra adviser time

The assessment of additional need tended to be described in terms of issues 'over and above' simply being aged over 50. As such, the idea of reserving extra interview time for all people in this particular group appeared to some as almost the opposite of the discretionary flexibility which they saw as central to their functioning as advisers.

The structure of JRFND (and possibly also the training workbook) had focused the attention of a number of advisers on the needs of 50+ customers at thirteen weeks, as they entered Stage 2 and had their first routine adviser contact. It was certainly at this point, as envisaged, that most designated 50+ extra interviews were taking place. However, it was not always as clear that this was driven by any particular priority that was being given to this customer group. In one district at

least the driver for carrying out more 50+ extra interviews was identified as being an overall shortfall against off-flow targets for 25+ customers in general rather than identified concern or priority for the 50+ specifically.

## 4.8 Fast tracking to Stage 3 JRFND

Hardly any of the advisers interviewed who were seeing 50+ customers at Stage 1 or Stage 2 of JRFND were fast-tracking any through to Stage 3. Where customers with a longer history of claiming benefits were considered, several advisers thought that they were in any case unlikely voluntarily to choose to be fast-tracked. Among other 50+ customers it was conceded that there was demand for more intensive adviser support. However, especially where those who had been made redundant after many years in work were concerned, there was a widespread feeling that it was not necessary to fast-track them in order to obtain appropriate and adequate help for them. The decision not to run specialist, bespoke 50+ training and support modules was also a factor in diminishing the value of fast-tracking as a measure in the minds of many advisers.

*‘What’s the point in moving them on? You know, you have to have something special to offer them, have something more. But why move them on to the same?’*

### 4.8.1 The benefit of fast tracking to customers

Most of the reasons given by advisers for not wanting to fast track people were based in an assessment that it would not be in the best interests of the customers themselves. Particularly where case-loading was being done in Stage 2 anyway, it was felt there was nothing substantially different about Stage 3 to warrant moving customers on to it.

*‘I don’t really see what extra help is in Stage 3 that they’re not already receiving.’*

Given this feeling that Stage 3 was essentially just an extension of Stage 2, advisers preferred not to accelerate their customers but to work with them in the first six months. Indeed, fast-tracking customers was seen by some advisers almost as an abdication of their responsibility towards them, and moving them on as ‘passing them off’ onto someone else.

*‘If you’re a good adviser, and you can agree a smart action plan with customers, then most barriers can be dealt with at Stage 1, if the customer’s reasonably receptive to working with you...So I wouldn’t look to pass somebody off to Stage 3 without making a good effort myself to try and identify what their barriers are.’*

There was a recognition that for many 50+ customers, fast-tracking was not appropriate and that they needed some time to adjust to their situation first, and to experience the realities of job-search and job application. Several advisers pointed out that in their view there was also a possible downside to fast-tracking if customers continued to have difficulty getting employment, in that it cut down the time they had to work with someone before they had to move on to an external Stage 4 provider. Regardless of advisers’ views of their Stage 4 providers (which were very mixed), there was a professional pride evident in their wanting to do as a good a job as possible with customers before they reached this point.

*‘It’s maybe just moving them closer to Stage 4 as well, whereas our plan is to help them now, we don’t want them getting to Stage 4, you know, we want to get them into work ourselves.’*

There was an awareness also that customers do not always know immediately what they need and what will be best for them. For this reason fast-tracking at an early stage was seen as having dangers in committing a customer irreversibly to something which in the course of time might prove not to be the best option for them.

### 4.8.2 Fast tracking customers close to State Pension Age (SPA)

For the most part, therefore, advisers' concern to do the best thing for their 50+ customers lay behind their reluctance to use the fast-tracking measure. One possible exception to this related to customers who were within a few years of retirement age and judged to be signing on primarily for the sake of their National Insurance contributions. In these instances, at least one adviser saw the issue as being more about the management of scarce Jobcentre Plus resources.

*'The closer they are to retirement age the more passive they are. I wouldn't really [fast track them] because ... I don't see how they would benefit from that – the customer is here just for the sake for it, they're missing a few contribution stamps, or you know they're a bit short of money until they get their pension – they're just here for the ride really. So there's no point wasting resources when you know we could easily just take their claim for six months and then they're off the register.'*

From a policy perspective it is worth noting that with these customers at the top end of the age bracket and close to retirement, the off-flow targets which advisers work to could be seen in some instances as being at odds with the policy of trying to extend people's working lives.

### 4.8.3 Reasons for fast tracking

In all districts, therefore, 50+ customers were only being fast-tracked in small numbers, and where fast-tracking was taking place it was usually for specific additional reasons rather than primarily because of age. In line with advisers' expressed wish only to fast-track somebody when there was something 'concrete' and 'extra' to fast-track them to, there were two key situations where fast-tracking was taking place. First, people with health issues were being fast-tracked in order to get them case-loaded with a Disability Employment Adviser (DEA).

*'I can't remember the last time I had a fast tracked 50+ customer, just because they were over 50. I've had fast tracks because of health problems...'*

Second, customers expressing an interest in self-employment were being fast-tracked to Stage 3 to bring them within eligibility for self-employment credit, and training grant.

*'If a customer was working towards going self-employed, and they wanted to be able to take advantage of the self-employment credit, then you could fast track that customer.'*

Advisers were willing to use fast-tracking where they could see an immediate benefit of this kind for a customer. Self-employment was seen as a particularly important area for those over 50, because of their maturity, their skills and experience, and the opportunity afforded by self-employment to 'bypass' issues of employer age-prejudice.

Customers with health issues were a cause for concern for some advisers because they could see the limitations of their current arrangements for case-loading those customers, and were anticipating difficulties coping with numbers in the near future as people were migrated off Incapacity Benefit (IB).

*'We're going to have people on our caseloads as JSA advisers who we can see need support of some kind in the workplace, and we're not going to be able to refer them, because the DEA will be chockablock.'*

The other area of support and incentive that was seen as of great value to customers, and of help to advisers in discussing work options with the over fifties, was the 50+ element of Tax Credits. However, eligibility for 50+ Tax Credits remained tied to having been six months out of work and claiming JSA and thus could not be accessed early through fast-tracking. Something perceived as a key benefit of Stage 3, therefore, was working against perceptions of fast-tracking as worthwhile and beneficial for 50+ customers.

## 4.9 Key findings

- The new 50+ measures potentially fitted un-problematically within the existing practices of JRFND, but importantly the 50+ were felt to require an additional process of assessment and identification of needs in order to target available support effectively and in timely fashion.
- The timing of support interventions was made difficult by the heterogeneity of the 50+ customer group: while a considerable number were seen as likely to benefit from earlier support, an equally large group were felt to first require time to adjust to their situation.
- 50+ customers were said to be mostly highly motivated and focused on getting back to work, but many presented advisers with a challenge in getting them to engage with the process of help, and subsequently in getting them to broaden their job search beyond the area of work with which they were familiar.
- Advisers saw practical help with CV building as one of the most crucial areas of support for their older customers.
- Processes designed to remind customers of their obligations as benefit claimants, and to enforce JSA conditionality, were seen as less appropriate for many 50+ customers and as potentially counter-productive.
- Advisers felt that although the available, generic support contract provision was a useful 'first port of call', there was a need for more bespoke provision focused on specific 50+ needs – and where this existed locally through non-contracted providers it was being widely used and was said to be appreciated by customers.
- The mode of delivery of provision was most widely commented upon as not suiting 50+ customers – large groups of mixed ages and motivations were raising concerns that the specific needs of older customers were not being met.
- The three available measures for 50+ customers all had a low profile and advisers had little personal experience of using any of them.
- Most advisers felt the measures had been seriously weakened by the decision not to go ahead with the planned new 50+ support modules.
- Work trials, although widely seen as highly suited to older job seekers, were no longer being promoted in several districts, but where they were being used they were said to be effective in getting people to try new types of work, prove themselves to employers, gain confidence in new roles and most importantly to get into sustained jobs.
- Extra interview time was somewhat obscured in practice, and in the minds of advisers, by numerous other stated opportunities to provide customers with interviews if they needed them: while advisers generally felt they could provide extra time whenever it was needed, it was not clear whether the attempted 'ring-fencing' of extra interviews for the 50+ was resulting in a greater proportion of time being allocated to this customer group or not.
- Very little fast-tracking to Stage 3 was taking place, and where it was it was almost always for customers with health issues or those seeking to go down the self-employment route.
- There was a widely expressed feeling that outside these two groups there was little point in fast-tracking customers because there was not much in the way of extra help available after fast-tracking that could not be provided without it.

# 5 The JSA 50+ customer experience

## 5.1 Perceived strengths, weaknesses and barriers

The older Jobseeker's Allowance (JSA) customers interviewed were far from universally gloomy about their prospects of finding work. Many listed the numerous strengths that they felt they brought with them. These perceived strengths<sup>5</sup> included:

- reliability;
- maturity;
- conscientiousness and good time keeping;
- work experience;
- proven work record;
- organisational skills;
- diverse expertise;
- evidence of being able to work under pressure; and
- qualifications gained 'on the job'.

While many of these qualities can be recognised as being generally accepted strengths of older workers, there were some who wanted to emphasise that the stereotypes could be misleading and that in their own case did not apply – for example the received views that older people were bad with computer technology and unwilling or unable to learn new skills. Several were also keen to make the point that people in their 50s knew the value of having a job and would do all they could to retain it once they were taken on.

*'[People] my age, in their fifties, tend to be the good workers because they want to keep their job, and I work with kids, you know what I call kids, around 21, and they're not bothered, you know, there's no interest or nothing.'*

### 5.1.1 Positive reinforcement from advisers

The kinds of strengths seen to be held by the 50+ group, as reported in national employer surveys, was matched by comments made by advisers. In many instances customers referred to the positive messages that they had received from advisers and recalled meetings where advisers had boosted their self-confidence by stressing the positive attributes that they could sell to potential employers in response to customer concerns that their age put them at a disadvantage in job applications.

*'[Jobcentre Plus staff] are saying that the qualifications and the experience that I've got are more valuable than the age that I am.'*

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<sup>5</sup> The positive attributes that older job seekers identified themselves as having closely match those identified by employers in Shury, J. *et al. National Employers Skills Survey for England 2009, UKCES Evidence Report.*

In many cases, also, a direct favourable comparison was said to have been made with the younger job applicants with whom people felt they were competing for work (perhaps on unequal terms). Awareness of those potential strengths had meant that many people had entered their initial period of unemployment in a positive frame of mind, despite the shock that they felt at being made redundant.

### 5.1.2 Disillusionment over time

It was after a period of time in which they had failed to find a job and to get back into employment, that an initial optimism began, for many customers, to be overtaken by feelings that despite their strengths things were loaded against them. Above all else was the growing sense that it must be their age putting them at a critical disadvantage.

*'I don't think that it's been obvious that my age has come into it, but I'm sure it has.'*

Some of the expressions of this sense of disadvantage were quite extreme, and provided examples of the kinds of 'negative mind-sets' that advisers were aware of and trying to overcome with their customers.

*'[Over 50] which basically you should say is on the scrap heap, I think so anyway.'*

*'[My strengths?] Well, at the moment nothing to be honest...'*

Several people in this situation described how they even began to view as weaknesses some of the things they had previously thought of as strengths. A long period of employment with the same employer was suspected to have been viewed by recruiters as an indication of being set in their ways; familiarity with one in-house IT system as limiting transferability of skills; the lack of any need to have made job applications or to have moved between numerous jobs as weakening people's readiness for the conditions of the current labour market and their ability to present themselves effectively.

These perceptions were felt even more strongly when people were faced with the need to consider areas and types of work that were completely different from what they had previously experienced. When previous experience was seen as largely irrelevant, then only the negative aspects of age were left.

*'If I went back into the social care field it probably wouldn't have been a problem, but I felt that if I tried something completely new, to try to sort of, if you would sell my skills into a different arena altogether, I felt that my age would have been against me, yeah.'*

### 5.1.3 Age as a background factor

Whereas being over 50 was not generally put forward by job seekers as being on its own a problem, it was frequently cited as being the factor in the background that combined with other possible weaknesses to put them at a disadvantage in the eyes of potential employers. Other commonly mentioned factors included low self-confidence, lack of up to date or formal qualifications and the need for re-training.

*'I've been a chef all my working life. So I've been doing it all along...but I haven't got the certificate to prove it you know...I can do the job but I just don't have the bits of paper to prove it.'*

### 5.1.4 Need for (re-)training

Most customers were perfectly accepting of the fact that they might have to re-train for a new job, and very few said they were unwilling to consider the possibility altogether. What concerned people most was the cost of training, whether because they felt they needed to pay for it themselves ‘up front’ and could not afford it, or because they worried about employers seeing it as an extra cost to taking them on which could tip the balance against them. Several people alluded to the relatively limited ‘pay back’ for employers on the costs of training an older person compared to someone younger, as being a possible barrier to be faced.

*‘They sort of think oh well she’s only got about another five years, and we’re going to spend all this money training her!? You know, I think that did come into it, yeah.’*

This perception was most obviously apparent among people within a short time to retirement age – typically those within five years of being 60 or 65.

*‘They’re looking for people who can probably commit to a fairly reasonable length of time... [They] think well he’s probably got four years, and then that’s it, he’ll be retired.’*

## 5.2 Employers and the jobs market

The experiences that 50+ customers had encountered in their job seeking tended to reinforce suspicions that their age was a significant factor preventing them from getting work. Because age discrimination is illegal (and almost all customers knew this to be the case) they were not able to produce ‘hard evidence’ that employers were rejecting them on the basis of their age. Many were nonetheless convinced that it was happening.

### 5.2.1 Agencies involved in recruitment

An interesting angle on age discrimination was raised by the comments of one customer, who explained the major difficulty he was having as being the result of nearly all vacancies in his field being handled on behalf of employers by intermediary recruitment agencies. This arrangement was said to be increasingly common as the numbers of applicants for every vacancy grew and employers wanted to avoid processing maybe hundreds of applications.

*‘There’s a lot of people chasing not a lot of jobs, so employers can afford to [have] pretty tight criteria. So an employer will say to an agency, right here are the criteria, go and get us a shortlist of four or five people to interview.’*

This practice was felt to ‘pass the buck’ on age discrimination from employer to agency and to further reduce the chance of older applicants getting to interview where they might be able to demonstrate their worth.

### 5.2.2 Over-qualification

For people who had been made redundant from relatively senior and managerial positions there was an added element to the difficulties of applying for posts – generally referred to as ‘over qualification’.

*‘You try and phone them up and you know they just sidestep you, you can’t get a concrete answer...without a shadow of a doubt it’s ageism, or it’s over qualification, or a combination of both.’*

More than one person described this as a 'catch 22' situation: if they applied for less senior jobs than those they had previously been in then they would be viewed with suspicion and as likely to move on when something better came along; if they attempted to find work similar to their previous job they would price themselves out of contention, even if they could find such jobs to apply for.

### 5.2.3 Perceived effects of recession

Despite the many perceived difficulties, however, it was noticeable that more people blamed their inability to find employment on the recession and on a general lack of available jobs than on age discrimination.

A rather more sophisticated view saw a direct link between the two, with employers who were hiring staff being able to be more discriminating amongst those putting themselves forward, and with age being one factor in this situation that could put one 'further back in the queue'.

*'I just know that there's a lot of people searching for a few jobs and anybody [older] is going to be looked at less favourably than someone who's a bit younger and more energetic.'*

A customer who was able to make the comparison between his current situation in the labour market and how he had experienced it a few years previously, was clear that the big difference he felt was not due to being himself two or three years older.

*'I would say it's more difficult now...This is only three years down the road, and yet I don't feel I'm less active, I don't feel like my brain's any worse, do you know what I mean, in fact I have learnt things even in the last two or three years.'*

Another customer, familiar with working for a number of different employers in his sector, expressed the similar perception that his age had only really become an issue once the available work began to dry up.

*'They didn't used to bother when there was plenty of work, you see I'd worked for these companies on and off for years, but all of a sudden they don't want to know, oh yes we'll get back to you, but they never do.'*

Many saw little hope of improvement in the labour market in the immediate future and were resigned to being expected to 'do more for less' than in previous times. The recession was seen as the main culprit in this situation, though many were bewildered that they had become its victims.

## 5.3 Decision making about employment

For many 50+ customers there was no question in their minds that they wanted to get back into full-time work as soon as they possibly could, and that their age did not affect the way they were making employment decisions.

*'I don't mind what I do, as long as I'm getting paid at the end of the month!...As long as I can keep going - the longer the better to be honest with you.'*

There was, however, some shift in attitudes apparent among those who were getting closer to retirement age. In some cases this was expressed in terms of a limit to what people felt they were physically capable of at their age.

*'I couldn't do that now, I couldn't work extra hours any more!'*

In other cases it was more the perception that with relatively little time to go before retirement it seemed unlikely to them that anyone would be wanting to employ them. Indeed several used the term 'semi-retired' to describe both their work aspirations and their state of mind.

*'You know I've only got five years work left anyway, who's going to employ me for that period.'*

### 5.3.1 Attempts to 'down-size'

There were significant numbers of older jobseekers, in all age brackets from 50 onwards, who expressed the wish in some form to 'down-size' their employment compared to what they had done in the past. Some were facing what they thought to be an unwelcome necessity to consider and apply for jobs at lower levels of pay and seniority than they wanted and felt they deserved, others were quite consciously making the choice to use their recent redundancy or their current spell of unemployment as an opportunity to down-size. Occasionally, this was couched in terms of a gradual reduction towards retirement, but more often in terms of a reaction to past 'excesses' of hours worked, miles travelled and levels of stress endured.

*'I mean I'm really done with living in hotels four nights a week...I've done my travelling time the last 20 years you know, I'd like to get a job [where] I can be close to my family.'*

There was a strong sense with many customers that they had 'paid their dues' to the world of work and deserved the chance to ease back a bit. For those with reduced expenses (mortgages paid off or children having left home) this seemed a reasonable and practical course of action. However, the realities of the labour market most were experiencing were indicating otherwise, and advisers were warning them of the dangers of thinking in this way.

*'So here's me thinking well I've done my 35 years, I probably just want a nice part-time job doing something I want to do – and there was somebody [my adviser] saying to me no chance!'*

Several customers described the difficulties that had arisen through applying for jobs at lower levels of responsibility and lower levels of pay than the ones they had held previously. Not only could employers be suspicious of their motives for the future but alternatively could see this evidence of down-sizing as indicating lack of commitment or drive.

*'[The recruitment agency]...did insult me I think...overstepping the mark was when he looked at my CV and said I'm sorry, I don't think you're the right candidate...I think his exact words were, my blue chip clients are looking for somebody on their way up the ladder and not on their way back down.'*

*'I just found it kind of frustrating that in some ways the success I'd made of my career was actually counting against me trying to down-size the type of job that I was doing.'*

## 5.4 Customer experiences of Jobcentre Plus: process and staff

Customers described a widely different range of experiences of Jobcentre Plus, from the very positive to the very negative. It is important in assessing these comments to focus on the precise circumstances that surrounded and to an extent determined them.

As always in these matters there was much in this variation which could be attributed to personal and individual factors of character and temperament. Responses were also clearly coloured by the different outcomes that people had achieved. However, there was a discernible overall tendency for more negative responses to be directed at staff involved in routine signing on operations, and for more positive responses to be directed at advisers (particularly if someone had been case-loaded).

Customers were further asked whether they felt the age of staff made a difference to the way they were treated. For the most part age was not thought to be important, though several people said they felt older staff were able to empathise more with their situation and understand better how they were feeling than much younger members of staff. If the age of staff was felt to be significant it appeared to be at a secondary level. Negative comments about routine interactions with Jobcentre Plus were reinforced with reference to younger staff's insensitivities, while positive views of interactions with personal advisers were reinforced in the same way with reference to particularly positive experiences when dealing with older and more experienced people in this role.

### 5.4.1 Signing on for the first time

Some 50+ customers were familiar with the Jobcentre Plus office and the way it worked. Those who had come to JSA from other benefits or who had experienced many periods of unemployment in recent years knew what to expect. For a great many, however, their current claim for JSA was the first in many years, or even the first ever time that they had had any dealings with Jobcentre Plus.

For those made redundant after many years in work, the experience of having to sign on was frequently a great shock and added to feelings of bewilderment and disorientation from losing their jobs.

*'At the job centre I was just crying constantly (and the next day)...because I've never been through anything like it, and I didn't think I'd have to go through anything like it.'*

The feelings of upset described by many customers stemmed from a strong sense that they did not really belong in a job centre and that they were embarrassed or ashamed to be there.

*'[It felt] absolutely horrendous – not that the people made me feel uncomfortable but I just, within my own self I found it very, very difficult not being able to pay my own way you know... not being able to work or find the work...I didn't want to be there at all.'*

Many were initially convinced that they would not be unemployed for very long, but the sense of wishing they did not have to be signing on made many engage as little as possible with the process to begin with and to seek to keep the time they spent at the Jobcentre Plus office down to an absolute minimum. The desire to get in and out again as quickly as possible stopped many from asking the questions they wished to ask, leaving them confused as to what they should do and what was expected of them, and unclear about the benefits, help and advice that they might be entitled to.

### 5.4.2 Assessment of needs

A lot of comments were made to the effect that their situation was not acknowledged or recognised by Jobcentre Plus staff, and that there was no time available for anything other than administrative and process requirements for at least the first couple of months, and sometimes even longer. Several people felt that they needed (and deserved) some time up front with someone who would tell them how the system worked, what was expected of them, and what support was available. Strong feelings were evident and the lack of such 'up front' time was even taken by some as an insult to their lifetime of working.

Clearly, many older customers would have appreciated more detailed information to have been given them, and more interest to have been shown in their individual circumstances, in the early stages of their claim. Several explicitly suggested a more in-depth meeting at the very beginning would have been helpful.

*'I wondered whether an interview to start off with on a one to one basis, just to try and establish a relationship with me might have been a better approach.'*

*'You should have that first appointment then, not eight weeks down the line, you need it at that point...'*

### 5.4.3 Feelings of alienation

A sense of alienation from the whole Jobcentre Plus process continued for many people into their weeks of regular fortnightly signing on. Underlying this feeling was the sense of not being like the other unemployed claimants that they saw; a feeling often reinforced by age difference but based fundamentally in the belief that, unlike many others they were genuinely wanting to work and were making real efforts to try to find employment.

*'On a personal level it was a bad experience because you know I'm sitting next to druggies and...I'm sitting there quite smartly dressed with my folder under my arm...and I'm thinking is this the level that I'm at after 36 years of working? And do people seriously think that I don't want to work? Or do people seriously think I'm happy at coming in here?'*

People felt that their work history over many years should have made it evident to staff that they were genuinely job-seeking (whereas the process they experienced seemed to them to imply the opposite) and that they should as a result have been accorded somewhat different treatment.

*'I think they should not treat us all the same...whatever age group you are...I think there should be something for older people you know, to be treated differently.'*

It was the sense of not being recognised as committed to working, and as making genuine efforts to find work, that explained some of the very negative and resentful reactions of older customers when Jobcentre Plus staff reminded them of their obligations under the JSA regime and the conditionality that applies. Generally, this first took place at a 'return to work' session approximately eight or nine weeks into the claim, and then again at thirteen weeks. These sessions were described as involving up to twenty people (of all ages but predominantly younger customers) and as often having a heavy emphasis on claimant obligations and potential sanctions on benefits for non-compliance. The mixed age group of these sessions allowed some 50+ customers to dismiss the message as being directed against others than themselves, because they felt personally committed to finding work.

What customers saw as key issues for the 50+ were apparently not being covered in these sessions. It is arguable that holding separate sessions for the over fifties would allow a more focused message to be conveyed, that could directly address the specific ways conditionality affected older customers. Issues might include, for example: explanation of how conditionality was the same even for those signing only to cover their National Insurance contributions or to satisfy the terms of mortgage insurance policies; or those no longer receiving contributions based JSA; exploration of the appropriateness of seeking to 'wind down' employment until retirement; and discussion of what working over many years actually entitles people to. All these issues were raised by 50+ customers and were commonly felt to have been missing from their dealings with Jobcentre Plus.

### 5.4.4 Expectations of active assistance

At the root of some of the dissatisfactions expressed by 50+ customers was the fact that in general they had strong expectations about their entitlement to be helped and about what that help should consist of. Even those willing to accept that part of Jobcentre Plus' role was to discourage people from claiming benefit if they weren't actively trying to find a job, were distressed by the feeling that most of the effort in the system seemed to them to be concentrated on discouragement rather than on help.

*'I'm not suggesting it should be easy, but there was nothing about it that was helpful.'*

As this quote illustrates, many people wanted, and expected, active help from Jobcentre Plus in finding and applying for jobs. While such help could be forthcoming later in a claim, especially if someone was case-loaded with an adviser or a Disability Employment Adviser (DEA), at the start of the process it was seen by many to be conspicuous in its absence. Several customers commented on the job applications evidence they had to produce at signing on, saying it felt like a waste of time and that Jobcentre Plus staff themselves seemed to belittle it. For these customers this further undermined their personal sense of worth and gave out a message that no-one was interested in helping them in their job-search.

*'The things that you have to fill in aren't worth the paper they're written on...mine were honest and sincere applications, but I could have put anything down there and nobody would have took a blind bit of notice...one person even said, to be honest with you nobody really checks up on them.'*

The greater people's prior expectations of getting active job finding support from Jobcentre Plus, the greater tended to be their sense of disappointment in the service they received. There were customers however who seemed to have accepted from the start that the effort was going to have to come primarily from themselves, and these people saw Jobcentre Plus in a much more favourable light.

*'As far as the [Jobcentre Plus] experience was concerned, I was impressed, it was professional, I didn't have any complaints, all the people...looked to be dedicated...I think they were doing a pretty good job.'*

In particular, people were willing to concede that the staff in job centres had a particularly difficult job to carry out and that constraints on their time had an important impact on what they could do for individual customers.

### 5.4.5 Qualitative difference in staff contact at Stage 3

Overall, there was a marked contrast between the way customers described the routine signing on of Stages 1 and 2, and the regular adviser support they had experienced primarily in Stage 3. The transition was often marked in their minds by the change in venue, whereby they signed on 'downstairs' for the first six months but met with their adviser 'upstairs' thereafter.

*'When you went upstairs you felt that you got that bit of a backing, that they were backing you more, that you got that personal touch, and that they were going to say "yes, let's ring this job, let's ring them up now".'*

Most importantly, at Stage 3 customers said they began to receive the kind of one to one, personalised support and active help with job applications that they would have liked from the start. Several customers argued quite eloquently for fast-tracking, even though they had not received it themselves (nor even knew it was available).

*'The over 50s should...go to the next stage a bit earlier if they could...for the six months you're there [downstairs] you don't get much help.'*

Where people had been case-loaded with a Stage 3 adviser they were generally complimentary about the service they had received and appreciative of the more intensive and pro-active help they received in searching for and applying to job vacancies, and in developing new lines of approach to future working.

### 5.4.6 Early identification of support needs

In those instances where the new measures had worked as intended – by identifying a customer early as needing extra support and providing that support in a timely fashion – it did appear to have been greatly appreciated by the recipient, particularly if it had led to a positive outcome for them.

However, there were rather more customers who felt that the early weeks of their claim had been unproductive. Clearly, not all those who said they would have appreciated more intense personal adviser support earlier on in their claim would necessarily have been judged as needing what is after all a limited resource. However, there was much prima facie evidence that the negative reactions engendered in many by a process which they experienced as bureaucratic and impersonal, had hindered their effective engagement. Even such matters as ensuring customers had a good and appropriate curriculum vitae (CV) (which advisers saw as crucial for this customer group) were said not to be happening routinely in all offices.

With hindsight, one customer saw the need for a formal early assessment for everyone although she had had to wait until much later before she felt anyone was taking account of her own personal situation and details.

*'I do believe that probably what they need to do is assess everybody that signs on...that's when you need to be assessed, that's when you need to be looked at, and [asked] 'where's your CV?' [etc.] You could be there for a day.'*

From customers' accounts of their experience of the Jobseekers Regime and Flexible New Deal (JRFND) process it appeared that very few connections were being made between front-line staff signing people on, and advisers who might provide more in-depth support and information. While some customers said they had been able to ask questions and had on occasion been referred to an adviser, the majority complained that they had found no opportunity to talk to anyone at greater length. Identification of a customers' additional needs relating to their age was largely confined to the scheduled review meetings in Stage 2 and even here appeared to rely very heavily upon the customer making a positive move to express a concern or ask for help. From the point of view of the customer this often felt like neglect.

*'I think that was probably the biggest sticking point, nobody looked at [my background], maybe they haven't got time, I don't know, but nobody ever picked up that I'd never, ever been on the dole before and never been out of work.'*

#### **5.4.7 Pressure points in the JRFND process**

A big part of the frustration of customers with the system they encountered was the underlying belief many had that there really was not very much that Jobcentre Plus could do to help them and to meet their needs.

*'I could sense that some of the folk in the job centre they understood what my issues were, but there was nothing they could really do to help.'*

Over-riding all other considerations was an awareness of how difficult the labour market conditions were, and that Jobcentre Plus was not able to help them into jobs if they did not exist. Those seeking more senior level posts generally felt that they knew more about opportunities and routes to finding jobs in their sectors than Jobcentre Plus staff could be expected to know. As such, they were clear that to a very large degree they were 'on their own' and no-one else than themselves was in a better position to make something happen.

*'I think it's down to me to move it along, it's not really down to you know, the job centre people to do that.'*

The most difficult interactions with Jobcentre Plus thus tended to come about at the point when a customer was having to be put under a certain amount of pressure to consider jobs that hitherto had been ruled out as in the wrong area or too junior or paying too little.

*'And I says well I've got a degree, you know, don't that mean anything? ... I felt I'd acquired in my working life a certain amount of skills, and as far as [the adviser] was concerned ... any [job] would do.'*

### 5.4.8 Addressing the age barrier

The attempt was made to ascertain whether 50+ customers thought that staff at Jobcentre Plus (and at any other provider organisations they may have had contact with) had successfully addressed the issues they faced regarding their age. The main indicator for this was taken to be the degree to which customers were bolstered and encouraged in their job-search efforts by their exchanges with advisers and others, or whether their experience of the JRFND regime had left them with the same concerns they started with, or indeed heightened their anxieties.

Help from Jobcentre Plus with sorting out practical issues, such as building a good CV or developing more effective interview techniques, was widely appreciated as having made a positive difference. Several customers were very clear that they had received good support and encouragement, and that advisers had emphasised to them the positive aspects of experience, over any negative aspects of being over 50. There was also evidence that where customers themselves did not perceive themselves to have an age-related problem, it was not being unnecessarily raised by Jobcentre Plus.

*'No, well they never said anything to me [about my age], so I don't really think my age is an issue yet...'*

Indeed, in confirmation of what advisers themselves described as their usual practice, it was said by several customers that the initiative in raising age issues had been left to them. Initial encouragement had not always borne fruit however, and for customers who found they remained without work for many months, despondency had sometimes set in which had been much more difficult to tackle.

*'I was 63 when I was made redundant...I mean I got a lot of encouragement form people [at the job centre] initially...they were all saying oh you won't be out long, with your experience somebody will take you on, which made me feel a lot better. But as I say after two or three months you lose hope, after six months all hope has gone.'*

Customer experiences were not uniform from office to office, however, nor from one adviser to another. Some customers felt that those supporting them had struck the right balance between recognition of objective difficulties in the labour market and a positive outlook on future opportunities. Others reported exchanges which had clearly reinforced their fears and had a negative effect on their optimism and motivation.

*'I was even told at the job centre by one of the advisers, when you get to 59 forget it, because you're not going to get a job.'*

While this appeared to have been a very unambiguous example of a demotivating effect, there were other more subtle indications that it could be very easy inadvertently to reinforce people's worries. One customer even read being sent to speak to an over fifties specialist as confirming her pessimistic outlook on finding a job in her mid-50s.

*'They were almost admitting it was a bigger problem at my age by saying you're now seeing a specialist over 50s adviser. So I felt that almost reinforced what I was thinking anyway.'*

While many people were willing to accept that Jobcentre Plus' role was a difficult one and that as much as was possible had been done for them, there were nevertheless a considerable number who interpreted their experiences as evidence that the over 50s were a lower priority group than younger jobseekers and that staff had conveyed this to them in their attitudes and actions. The sentiment that those over 50 had enjoyed their working lives and should be willing to step aside in favour of the young was even one person's interpretation of his treatment.

*‘When you’re in such a vulnerable state, I don’t think there’s much (not that you expect sympathy) but support...It’s like you’re one of millions...you’ve had a good stab at work...’*

The balance of the evidence appeared to point to generally good practice from advisers in addressing age related issues, except perhaps in one particular area. Many customers who were within a few years of retirement age described feeling encouraged to take retirement, or even being quite explicitly told that this would be a better option for them than trying to find work. For some this was in line with their own thoughts too, but for others who really wished to find a job and had no intention of retiring, it had come as something of a shock.

*‘The only thing they asked was if I wanted pension credits. So that answered my question really – I thought well there they are trying to pension me off anyway!’*

*‘[My adviser said] your best bet is to tell your partner...to pack her job in and you’ll get £210 from your pensions...I mean that’s out of order for him to say that.’*

It is the case that anyone can choose to leave JSA at any time, that there is an upper age limit to claiming it, that people can continue to work beyond State Pension Age (SPA), and can continue to look for work through Jobcentre Plus if they are receiving Pension Credit. The research also found that those customers approaching SPA who were determined to find work, and had no real alternative, were generally getting good support from advisers. However, there was also evidence (from both adviser and customer interviews) that advisers were more inclined to agree with older customers that getting back into work was an uphill struggle, and that those with other income options such as occupational pensions could be encouraged to consider taking them early rather than continuing to seek work.

*‘One [adviser] actually said to me why don’t you take your pension?’*

In addition to this there was some evidence of older customers being so alienated from Jobcentre Plus procedures that they were leaving JSA, and the help that can come with it, earlier than they might otherwise have done, arguably reducing their chances of finding work still further.

### 5.4.9 Additional support sought by customers

When asked what sorts of help and support they would have liked to have had from Jobcentre Plus, customers were very clear and there was a remarkable consensus across different customer types and circumstances. The key things most customers said they wanted were:

- an ‘inside track’ to available jobs;
- detailed and specific information on their local labour market;
- more information on training opportunities;
- provision of an active job-matching service based on an understanding of their individual history and circumstances; and
- for Jobcentre Plus to be pro-active advocates on their behalf with potential employers.

The means by which most customers thought such services should be delivered were through:

- more contact time with advisers;
- greater continuity of contact with the same staff; and
- facilitation of opportunities to meet other customers in similar situations and facing similar difficulties.

### 5.4.10 Relations with personal advisers

Customers generally reported very good relations with their personal advisers and made many positive comments about the support they had received from them. Very much in line with what people said they wanted or expected from Jobcentre Plus staff, customers tended to compare advisers favourably to those who they saw for regular signing on, and to make specific mention of several key aspects to the support that they saw as particularly valuable.

The first of these was an appreciation of what they saw as personal attention, a one to one delivery that displayed a genuine interest in their particular situation, experience and concerns. Simply having the time to discuss matters in detail was valued greatly. Getting personal attention and time was seen as allowing advisers to really get to know them and understand their situation in all its detail, and thus be in a better position to help.

*'I had a one to one adviser and she was absolutely brilliant, and she...used to phone me, she was brilliant, if anything came up on the screen that she thought might be of interest to me, she'd phone me on my mobile...[it was helpful] because she got to know me.'*

The second aspect that was highlighted was continuity. Not only was this felt to help put them at ease but was also seen as making an important contribution to an adviser being able to get to know a customer and not have to spend time continually going over the same ground.

*'I was pleasantly surprised and quite impressed, and not only by the fact that the particular [adviser] who helped me along the last little bit of the way...stepped things up, but he didn't just leave me hanging there, he actually continued to sort of talk to me, to encourage me, and I think there was genuine interest there.'*

The third major positive point identified by customers in their relations with advisers was the opportunity that some had clearly taken to be more pro-active in their support – digging out contacts and job opportunities, ringing customers with vacancies and other information, and helping in the application process by making phone calls to employers regarding jobs.

These positive aspects of working with an adviser appeared to go a long way towards addressing some of the really difficult decisions customers had to make, and helped tackle the changes in attitudes or perspectives that were required of them, for example in looking for work in new areas and coming to terms with likely drops in income levels. Within the context of positive adviser support customers were more inclined to accept the need for a bit of a 'push' in this direction occasionally.

*'A lot of people do the job in certain industries, the industries are dying and you need encouragement to look at something different.'*

*'My back was against the wall and I needed a bit of help. And they provided it in a very clear and concise and friendly manner, and I found them very, very helpful.'*

Several customers did make mention of having achieved a particularly good rapport with their adviser, and often a factor in this was said to be the adviser's age. Advisers who were closer in age to their customers were felt to have a greater understanding of the situation people found themselves in. This was particularly appreciated if an older adviser also had some life and working experience through which they could relate to customers. Indeed, for some it was this quality of personal experience and understanding that was even more important than simply being of a comparable age.

*'There's young people [advisers] in there that are great, but the older ones that have gone through industry, that have gone through changes themselves, they're better at talking to somebody like me or somebody of my age.'*

### 5.4.11 Referral to provision

A number of customers had been referred by advisers to support provider organisations. The vast majority had seen providers contracted with Jobcentre Plus under the 25+ general support contract. Customers' comments about this provision echoed many of the concerns expressed by advisers, particularly that they had not been able to get their personal issues and concerns dealt with directly enough or on a one to one basis. The mixed age basis of provision and the sometimes large group sizes were mentioned as not being ideal, though many, especially those with the greatest self-confidence had nevertheless been able to get something of value from the provision.

Those with less self-confidence appeared to have been better served by certain non-contracted providers, such as local authority and careers services provision, at which they had been able to get more personal help. As with advisers, customers focused on the importance of getting help with their CVs, and outside providers were clearly delivering on this for many people.

*'[They] showed me how a CV should be written effectively...It did give me a little bit more confidence, because my CV does read good, I'd employ me if I read it...it's that good now in comparison to what it was before!'*

Although CV building was seen by all as being of crucial importance to the 50+ customer group, there were several customers who had either not been referred to the support contract provider, or who had still required more assistance after attending such a session. Some had been fortunate enough to find that assistance elsewhere, though through very ad hoc and fortuitous routes, such as one customer who changed upon an agency that provided the CV help he wanted, and indeed later directed him to some work opportunities.

The other notable area of provision to which customers had been referred, and where they particularly valued the help they received, was provision related to self-employment. Business Gateway and Business Link were mentioned by several customers who were moving to self-employment as having been very useful both in practical terms, with training in procedures and workshops on what to expect and how to survive, and in financial terms with help setting up a bank account and receiving funding.

## 5.5 Customers' experience of the 50+ measures

The low profile of the new 50+ measures, that has been described elsewhere in the report, combined with inconsistencies in the way participation in the measures has been recorded, meant that the amount of information gained about them from customer interviews was much more limited than had been hoped at the outset. Many customers were unaware of anything having happened to them in their dealings with Jobcentre Plus on account of their age, and identifying aspects of their experience that might have been affected by the new measures was often problematic because it was not readily apparent to the customers themselves.

### 5.5.1 Extra time with an adviser

More than half of those respondents marked in the data as having had extra interview time with an adviser to address age-related concerns and issues, struggled to recall anything that they had been through which might fall under this heading. In several other instances the only extra time that could be recalled, over and above routine signing on procedures, had been in group sessions or workshops. These group sessions had been with other claimants of all ages rather than on a one to one basis with a personal adviser.

Designated 50+ extra interviews sometimes appeared to refer to other ‘types’ of interview, whether these were scheduled review meetings at various different stages of the JRFND process or additional interviews arising from local initiatives that were aimed at all customers and not just the over 50s. Whatever the administrative reasons behind the way these different meetings were treated, the effect was to ‘blur’ any distinction in customers’ own minds. If customers had been given extra interview time under the new measure, therefore, it tended to merge in their minds with other interviews and meetings that they had had. The extra interview time did not stand out in their memory as having been different or distinct from other support they were receiving.

This need not be seen as a completely negative state of affairs. Certainly in those districts where advisers had asserted that they had a lot of discretion (and time) to provide additional meetings if they were requested, their customers too confirmed that this was indeed what had been happening.

*‘The only thing you have to do is make an appointment, and that isn’t a big deal you know. And I’ve found them very helpful.’*

Under these circumstances it was difficult to identify what the content of any extra interviews may have been. When pushed on this point customers referred to particular queries they had made which had led to a meeting – for example, queries about training or self-employment. Other than addressing such queries the extra meetings were described as largely covering the same ground as covered routinely only at greater length or in greater detail: job searches on-screen and discussion of applications and interviews if they had been to any.

### **5.5.2 Fast tracking to Stage 3 JRFND**

A similarly large number of customers marked as having been fast-tracked to Stage 3 of JRFND appeared not actually to have been fast-tracked in any recognisable way. The exceptions were almost all either people who had been interested in self-employment and looking to access Self Employment Credit, or people with health issues who had been referred to a DEA for case-loading. This mirrored very closely what advisers had said about fast-tracking and their identification of these two types of customers as the ones that they would be most likely to fast-track under the new measure (sometimes exclusively so).

Customers who could be reasonably confidently identified as having been fast-tracked had all been case-loaded with a Stage 3 adviser who they had seen on a regular basis. They identified the same elements of this adviser support as being of value, as had those receiving less sustained contact. One to one support, delivered by the same advisers and thus with greater continuity, and active help with their job-searching or self-employment development, were singled out as the most positive aspects of the more intensive support they had been fast-tracked to.

A small number of customers with neither health issues nor self-employment aspirations had taken positive steps to be fast-tracked because they felt impatient with their job-search activity and wanted the extra help and support that they would otherwise have to wait six months for.

*‘Certainly if you’re over 50, there’s not a lot of point in waiting six months to get the appropriate assistance.’*

It was these customers, however, who appeared to be the least satisfied with the situation they found themselves in. Their expectations of the extra help and support they would get in Stage 3 had sometimes been disappointed.

*'They said if you go every week and you go upstairs they can give you more help, so I opted to go every week...I volunteered to do it...I wouldn't say it was help, it was still the same questions you know, where have you been looking for jobs, have you had any success, any interviews, they didn't actually come up with, you know there's a job there do you want to go for it, they didn't really sort of do anything like that.'*

The experiences of these people tended to support the views of many advisers who said they did not see the point of fast-tracking most people because there was only very limited extra help that they could fast-track them to. The generally very much more positive reactions from customers fast-tracked for health or self-employment reasons also supports the view that customers are seeking very concrete advantages if they look to be moved ahead in the process in this way.

The help available from a DEA was certainly seen in this positive way by more than one fast-tracked customer, and most of those fast-tracked for self-employment support likewise saw it as a very positive move.

*'Well, after a while...they moved me up to a fast-track something or other, and this woman upstairs was very good, helpful, she did everything that she could to try and help me, which was totally different from downstairs...She told me what was available, incentive wise and whatever, and eventually I settled to doing a driving course and they gave me £50 a week for eight weeks [self-employment grant].'*

However, perhaps inevitably, there were a few for whom even the help available for self employment fell short of their expectations and left them dissatisfied.

*'Fast-tracking, that's what it was called...But they don't help very much...they wouldn't help with funding or anything like that.'*

### **5.5.3 Day one work trials**

Many customers in our interview sample had experienced a work trial (or indeed more than one) and many of them had successfully sustained employment following it. However, most of those marked as having undertaken a work trial had not actually done so under the auspices of the new measure. The measure made work trials available from day one to those aged over 50, where previously eligibility only began at the six month stage of a claim. Two thirds of the people interviewed turned out to have done their work trials at some point six months or more after first signing on for JSA. The work trials were thus not 'early' work trials made possible by the new measure, but could have taken place anyway under the previous eligibility arrangements.

Whether undertaken 'early' or not, work trials were seen by almost all those who had been on one to have been a positive step and an important help in getting them closer to work. Explicit criticism came only from a few customers who had declined to take up the option themselves, and who failed to see any of the advantages that others described.

*'I wasn't going to have some company that I'd already applied to and refused me and then basically...go there through the job centre and not pay me. I thought no, I'm not doing that.'*

For the most part work trials were viewed in a very positive light and customers were pleased that they had been given this option. From the comments made by customers it also appeared that work trials were operating as planned and that the intended benefits were being felt. These included: the chance to prove oneself capable of a job; the chance to see if employer and employee could 'get on'; and a low risk return to JSA if things did not work out. A work trial was also seen by one customer as an opportunity to get the backing of his adviser and some advocacy support with his potential employer.

*'Years ago it seemed that if [the job centre] threw their weight behind you...it was a good thing. And the only way they do that or seem to do that is on the job trials.'*

Some customers who had undertaken more than one work trial also felt that, in spite of not getting a job after their first one the experience had had a very positive effect on their personal confidence and their belief that there were jobs available that they could do.

*'Yeah, it goes to show that you know there's jobs out there, and if you're not certain, have a go at them.'*

Work trials were also described as having a potentially huge effect on a person's sense of self-worth and their idea of what they were capable of in the way of work. One customer, who had been off work following a breakdown in her mental health, described how a work trial had completely restored her self-confidence and had got her back into full-time working, as well as helping reassure her employer that she was ready to get back to work.

*'She took me on for a work trial because when I went for the interview I was really nervous and do you know it was obvious, I was very shaky and breathless, and so she took me on, it only turned out to be three days because as soon as I went I settled down...and...over a period of time I started working a little bit later, then an extra day - I'm the only full-timer there now!'*

An interesting approach to work trials was described by one customer who was a welder and had been the manager of a fabrication shop within a larger company before being made redundant. Because of a downturn in this sector of the economy he was having to look at jobs which involved a return to the shop floor and was concerned that although he was confident he could carry out the required jobs, he did not have recent proof of that capability. He had also found that the uncertainty in the sector was leading many employers to offer work on the basis of anticipated contracts which then did not materialise, taking the potential jobs with them. This customer found he was able to use work trials in this situation to both his own and the employer's advantage by accepting the high risk that work might not materialise as planned but agreeing to work on a trial until the contract situation became clear, using the shop floor experience gained in this way as recent proof of his abilities in different areas of fabrication for inclusion on his CV; in effect using work trials as a way of obtaining 'top-up' experience, even if, on more than one occasion, they failed to lead to a job.

Most work trials were, therefore, seen to be working effectively as they were designed to do. However, there were a few trials described that appeared to be pushing the limits of the model, or even to be examples of abuse of the system. One customer described doing a work trial which she was not aware to be one until she had started working. The employment arrangements were complicated by being set up through an agency and this had left her unclear as to who she was directly working for. She had nevertheless continued in employment from that time. Other customers did not always enter work trials at their own choosing, but felt pressurised to undertake them in case they lost the job otherwise. This was the 'bottom line' for many of those who had done work trials; even if they were not particularly keen on the idea, people would agree to a trial because they could see there was a good chance of a job coming from it.

## 5.6 Key findings

- Customers typically started with optimism that they would quickly return to work, though often experienced something of a crisis after a few months if still out of work – experiences of failed job seeking tended to reinforce suspicions that their age was a significant barrier to their finding work.

- Many customers wanted to get back into full-time work as soon as possible, but there was a discernible shift in attitudes among those close to SPA, with thoughts of retirement being more prominent.
- Significant numbers of customers were seeking to down-size their work in terms of the hours, travel time and stress involved, and saw their recent redundancy as an opportunity to do this – although in practice down-sizing was rarely as straightforward as they had anticipated.
- Customers' experiences of Jobcentre Plus and their views of Jobcentre Plus staff varied widely from the very positive to the very negative, with an overall tendency for more negative remarks to be directed at staff involved in routine signing on, and more positive responses directed towards advisers.
- Because many customers had never set foot in a job centre (or not for a long time) they felt disorientated and out of place there and some were very distressed by the experience. Most customers professed a feeling of alienation, heightened by what they described as an impersonal process early on. In particular, 50+ customers felt their proven work history entitled them to a different sort of treatment to other claimants.
- There was a high level of expectation for more active help from Jobcentre Plus, and many customers expressed the wish for personal adviser support from very early on – even from day one.
- Customers generally reported very good relations with their adviser and in particular appreciated the personal interest shown, the continuity of support provided and the pro-active help they often received.
- The balance of evidence appeared to point to generally good practice from advisers in addressing age related issues, with the possible exception of some customers close to SPA who thought advisers had encouraged them to give up trying to find work.
- Customers' comments about support contract provision to which they had been referred echoed many of the concerns expressed by advisers, though most had managed to get something positive from it.
- Customers experiences of the 50+ measures also mirrored the low profile of these measures in the minds of advisers – many struggled to recall any extra interviews, many work trials turned out not to have been specifically early work trials, and fast-tracking was remembered best by those case loaded with a DEA or provided with self employment credit.
- Of the three measures, work trials were the best appreciated by customers who saw the direct link to a job – they also appreciated the opportunity they gave for their adviser to act as an advocate for them with an employer, for the chance provided to prove work skills, and for the boost they could give to self confidence.

# 6 Conclusions and implications for policy

## 6.1 Conclusions

Jobcentre Plus adviser training was introduced in April 2010, aimed at dealing with older Jobseeker's Allowance (JSA) customers and their potential concerns, attitudes and barriers to work. It was accompanied by three voluntary measures for those over 50: access to work trials from day one; an extra 30 minutes of adviser time; and the option to fast track to Stage 3 of Jobseekers Regime and Flexible New Deal (JRFND). The training had generally been well received by those advisers who had undertaken it, and there was some evidence that it had successfully raised the profile of the older JSA customer group and focused some attention on their needs and issues.

However, those undertaking the training (at least in the first seven months) appeared to have included many experienced advisers who viewed it largely as 'revision' and may not have been those most in need. They also included many specialist Stage 3 advisers who did not routinely see customers in the first six months of their JSA claim. This is likely to have reduced both the effectiveness of the training and the take-up of the new 50+ measures, which are centred on the promotion of early intervention (extra adviser time, early work trials and fast tracking to Stage 3 JRFND).

Two other factors appeared to be lessening the impact of the training and the measures. First, the accompanying message was felt by many advisers to have been weak. Second, the decision not to run specialist Support Contract modules for customers over 50 was widely seen as indicating low policy priority and as undermining the measures themselves by removing, in advisers eyes at least, the main substance of any extra help and support offered.

Notice of the training and the 50+ measures had generally been by email and was described as many advisers as buried in the great volume of material they received in this way. Little or no discussion was said to have taken place at office level between managers and advisers about the importance of effectively addressing the 50+ customer group, and it was not a subject that any of those interviewed recalled having been raised at routine communications meetings. Given the considerable value participants at the 50+ Interview Skills Facilitation Seminars placed on the opportunity provided there for talking to colleagues about older customers and exchanging experience, this might be a simple and productive route to take to raise the profile of the customer group.

The decision not to run bespoke 50+ support contract modules had had a major effect on advisers' perceptions both of the importance attached to this customer group and of the purpose of the measures. There was a clear demand from both advisers and customers for such bespoke provision, and evidence that existing generic support contract provision was not always serving older customers well. In particular, 50+ customers resented being grouped together with all other job seekers and felt their specifically different needs (for example with regard to curriculum vitae (CV) support) were often hard to meet in such a situation.

Advisers were also strongly focused on having something 'concrete' that they could offer customers as the end result of an interview or of a series of meetings. For this reason they particularly appreciated the signposting aspects of the workbook, but equally perceived the withdrawal of the

bespoke support contract modules as greatly reducing the likelihood that they would be able to offer older customers extra support and help in the form of additional meetings or fast tracking to Stage 3 of JRFND, as intended.

In part for these reasons, the measures had a very low profile in the minds of advisers everywhere. Many struggled to remember an occasion when they had invoked one of the measures or had seen a customer specifically under the auspices of one of them. In some districts a local policy decision had been taken not to promote work trials to any customers, let alone to encourage them among the over fifties, which was working directly counter to the intention of that measure. In other districts there appeared to be a general consensus that because there was nothing to fast track people to (that is no bespoke 50+ modules) that this measure should not be used. Exceptions to this were being made in respect of those with health issues (in order to case load them with a DEA) and in respect of those seeking self-employment support (in order to allow them to access the Self Employment Credit).

The administrative data used to identify customers who had taken up one of the measures reflected this low visibility. Many customers marked as having had work trials had not specifically had an early work trial as made possible under the measures, and many of those marked as having had extra time with an adviser could not recall any meetings over and above the routine reviews they could expect in any case.

However, advisers did not generally believe that any of this meant that 50+ customers in need of help were not getting it. In particular, the extra adviser time identified and made available under the new measures was everywhere said to have been subsumed, or obscured, by the many other opportunities that existed for having extra meetings with customers. A combination of scheduled reviews and back to work sessions (and extensions to them), Stage 2 caseload and non-caseload interviews, and additional time justified under a range of indicators of disadvantage (other than age), were felt to effectively cover the needs that older customers had.

Where the measures had been used as designed, the research produced evidence that they could work to considerable beneficial effect. Work trials in particular appeared to be working well and were appreciated by customers taking them up. They were seen as providing both an edge in applications and an opportunity to get some 'backing' from Jobcentre Plus and a degree of advocacy from an adviser in dealing with potential employers. They were also seen as opening up new work options for people and were even being used as a means to gain practical on the job competency proof for inclusion on a CV. Above all they were seen to work. Most people were getting jobs as a result.

What was far less clear from interviews with advisers was whether 50+ customers' needs for support were being identified and acted upon in a timely fashion (a key aim of the new measures). Needs assessment processes were not entirely clear, but especially in the area of age-related issues, advisers were concerned not to create problems where they had not previously existed, and so were essentially reactive – responding when particular queries or worries were aired by customers. This responsive model meant that most extra needs for support were picked up in scheduled meetings with advisers rather than through any other contact a customer had with Jobcentre Plus. Although some referrals to appointments with advisers were taking place from staff dealing with fortnightly signing-on, for example, these were generally thought to be few and far between. Several customers described the first two months of their claims as completely taken up by administrative procedures, such that they felt unable to air concerns or talk about issues, or even to ask questions, rendering any identification of their support needs in getting back to work very difficult.

There were some acknowledged tensions and contradictions at play in the JRFND process. Age UK, whose representative had been involved in the design of the 50+ training, stressed that older people

often feel the need for a period of reflection and re-orientation following the shock of having lost their job, before they are ready to engage actively with the process of finding new work. On this basis it could be argued that the 13 week stage of a claim is an appropriate point at which to start looking to see if someone might benefit from extra support. However, many customers who described just such a period of shock and disorientation, nevertheless said that they would have appreciated adviser contact from day one to help guide them through that period as effectively as possible. In the event it often appeared that the main indicator that a customer might need additional support was the default that they had remained out of work for a particular length of time. Part of the rationale behind the new 50+ measures was precisely to try to prevent this from happening.

The measures also sit potentially uneasily in relation to the other strong organisational pressure within JRFND to focus resource where most needed and to leave those capable of finding themselves new employment to 'get on with it'. Many 50+ customers were seen as being thus capable, and advisers felt justified in waiting to see who was still on the register after a couple of months. They also made no apology for the fact that they expected all customers, of whatever age, to shoulder their obligations under JSA conditionality, and thus emphasised this during the first Back to Work Session (BtWS) at eight to nine weeks. However, it was abundantly clear from interviews with customers that, especially in this age group and among people with long, solid work histories, such pressure was commonly resented and ran the risk of alienating people from the process and having the opposite effect to that intended.

Advisers too spoke of an adjustment period for older jobseekers, but with the emphasis on the need for many to develop a more realistic view of the labour market and the job opportunities for them within it. Following early optimism of a quick return to work, and a subsequent despondency when still claiming JSA after several months, customers were described as reaching a kind of 'crisis point' where they were forced to start considering jobs of lower status than they had been in previously and at lower rates of pay. This was also the point at which some advisers felt they could have their most effective input.

Because a large part of the 50+ customer group was seen as being made up of people with long work histories and recent redundancy from jobs they had expected to be in until retirement, this 'crisis point' was something very specific to older jobseekers, and raised some issues that could perhaps be highlighted in any future revisions to the training material. Not only do the issues of wage expectation and financial commitments come fully to the fore at this point, but the unspoken background factor of retirement can become explicit. For customers approaching current State Pension Age (SPA) the failure to get back into work can easily become retirement by default. Even for those people still some years away from SPA, ideas of 'winding down' the hours and stress levels of potential work come to the fore and among some a mental attitude of 'semi-retirement' can be evident.

For advisers, encouraging retirement in these circumstances might seem a logical option in that it could achieve off-flow. Similarly, waiting until the six month point in claims before intervening with additional support might be justified in terms of the numbers who have been on contributions based JSA and who will stop signing on at this point if they feel there is nothing of benefit to them in continuing. Incentive structures for Jobcentre Plus advisers must place greater emphasis on flows into work, rather than off flows from benefit to non work destinations, to ensure they are working in line with the bigger policy direction of encouraging longer working lives.

Additional adviser support could be the one thing that could retain some customers within the realm of job searching under these circumstances. Certainly, there did appear to be demand among customers for more adviser support than they were currently getting. Specifically, customers wanted more one to one support, continuity with one adviser who could get to know them and

their particular circumstances, more information about training and re-training possibilities, local labour market information, and (for some at least) active hands-on help with job search and job applications.

### 6.2 Implications for policy

The 50+ training had provided useful additional material for advisers to work with and had to some extent succeeded in raising the profile of this customer group with Jobcentre Plus staff. However, the message accompanying the training, concerning the importance of older jobseekers and how advice and support to them needs to be viewed within the context of an ageing population and the extension of people's working lives, could usefully be strengthened.

The research illustrates the need to re-iterate that training in 50+ issues should be available for all advisers who come into contact with 50+ customers. There may be gains to be made from targeting the training on both newer and less experienced advisers, and in particular on those advisers seeing customers in the initial stages of their claim. The training has the potential for achieving its greatest impact with those carrying out New Jobseeker's Interviews (NJIs), BtWSs and review meetings in Stage 2. In addition to this, 50+ training for front line staff carrying out fortnightly signing on with customers could increase the numbers of early referrals to adviser appointments from this source also.

There was a demand from both customers and advisers for some form of bespoke 50+ provision. Where non-contracted 50+ provision was available, that mirrored the planned bespoke support contract provision which did not go ahead, advisers were accessing it and reported favourable responses from their customers. Dissatisfaction with existing support provision was largely an issue with its mode of delivery, though this was thought to have some serious implications for identifying and meeting the specific needs of 50+ customers. Advisers were strongly of the opinion that the availability of bespoke 50+ provision to which they could refer customers would also add important content and focus to advisory meetings and would greatly strengthen the value of the remaining measures.

The low profile of the measures in the first six months of the initiative can be seen as evidence of a lack of 'ownership' by Jobcentre Plus staff. The measures were seen as potentially running counter to the current trend in adviser practices towards a focus on individual need and a flexible approach based on signposting and referral to external services. The measures appeared to be working most effectively where they were perceived to enhance existing practices – for example with the fast tracking of customers with health problems and customers seeking self-employment support – but were being weakened by some contradictory local office policy decisions, such as the non-promotion of work trials. Greater ownership of the measures might be achieved by making bespoke provision available to advisers as a referral option. Also, a clearer message as to the reasons for additional support to 50+ customers, and the aim of the measures to achieve early and timely support interventions for them, would help.

The processes employed to assess customer 'need' were unclear, and were complicated by the very heterogeneous nature of the 50+ customer group. However, a number of factors emerged from the research which seemed to be specific to the over fifties and the ways that they engaged with Jobcentre Plus, particularly that large group who had a solid work history prior to recent redundancy. Most importantly these included:

- Expressed demand for adviser support from day one by many in the customer group.

- A sense of alienation from the Jobcentre Plus process which for some was preventing effective engagement with the job seeking process.
- A marked 'crisis point' after two to three months of unsuccessfully seeking work, at which many opened up to the need for help and advice from an adviser.

It would be worth considering whether the training for staff could be re-focused around these points in the customer journey through JSA, which will be readily recognisable by advisers and might relate more directly to their operational experience and priorities.

The current tension between off-flow targets (which can be met through a customer's retirement or effective retirement and signing off the register) and the broad policy aim of extending working lives, appears to warrant attention, and clear policy priorities need drawing up regarding how to treat those approaching SPA.

# Appendix A

## The new 50+ measures

### Additional training for Jobcentre Plus advisers

New training on the issues faced by older job seekers, and possible ways for advisers to respond to typical attitudes and mind-sets they were likely to encounter with these customers, was introduced to assist Jobcentre Plus advisers to be more effective at helping the over 50 age group. The new training was devised in consultation with Age UK and included a workbook for all advisers to complete (taking approximately two hours) as well as a further day or half day interview skills facilitation event for selected advisers.

The workbook was designed to support the key adviser competencies of customer engagement, building rapport, boosting confidence, assessing needs and signposting or making referrals to additional support where appropriate, with this particular customer group. The facilitated skills event was intended to provide an opportunity to put into practice, using case studies, the learning from the workbook, and to provide the opportunity for group discussion of the challenges facing the 50+ customer group and how they might be overcome.

The training workbook was to be undertaken by all advisers who had any contact with the 50+ customer group. It was expected to require approximately two hours to complete and was to be made available on the intranet and for printing off if required. The estimated number of advisers that would eventually undertake the workbook was 12,000 (and approximately half this number had done so when the research was begun, six months after the introduction of the new measures).

At a time of great pressure on Jobcentre Plus Offices, and because even the modest time required adds up, office managers nominated one key adviser who would do the training by the launch date for the measures, with the understanding that others would follow when the time could be found.

### Extra adviser time for 50+ customers

An additional, voluntary 30 minute interview with an adviser was made available for 50+ customers identified at the 13 week stage of a claim as likely to benefit from extra support addressing age related barriers to employment. The intention was to make available extra adviser time that was effectively 'ring-fenced' for the 50+ customer group in recognition of the additional disadvantage that can derive from age related issues.

The planning assumption was that nationally and for all customers there was considerable capacity for additional adviser hours. The budget allocated for the new 50+ measures was sufficient to cover up to 100,000 half hour interviews.

### Earlier access for over-50s to work trials

Work trials provide a short period within which a job seeker can trial a job vacancy while continuing to receive benefits, thus allowing a straight forward continuation of their claim if the trial does not lead to their being employed. Work trials seek to provide individuals with the opportunity to gain greater confidence in returning to employment. They enable employers to assess whether a

candidate is up to the job, and allow prospective employees to gain a greater understanding of their suitability and predilection for a particular type of work, and of the needs of potential employers.

Research shows that work trials have been effective in helping employers overcome their concerns regarding older potential employees. Under the new measures eligibility rules were changed to make it possible for people over 50, whom an adviser thinks would benefit, to access work trials from the start of their claim to Jobseeker's Allowance (JSA). Previously they would only have become eligible after six months of unsuccessful job search.

Data on work trials has been difficult to obtain. The measure is known to have had success in getting people into jobs though no information is currently available relating specifically to customers aged over 50.

### Optional early entry to JRFND Stage 3

Under the new measures, JSA customers aged over 50 years of age were added to the list of groups eligible to be considered for optional early entry to the more intensive support that was previously accessed in Stage 3 of Jobseekers Regime and Flexible New Deal (JRFND) from the six month point of a JSA claim. The aim was to ensure that advisers would consider customers aged over 50 for early access to the support available at Stage 3 if they judged that customers had significant barriers to work.

### [Bespoke 50+ support contract modules]

Two planned bespoke Support Contract modules for the over 50s claiming JSA, that were originally intended should be part of the new measures making up the enhanced service offer, were not taken forward. The modules were to have been a two day event entitled '50+ : Being Positive about Work' and a one day event entitled '50+ : Presenting Yourself to Employers'. The former was to enable customers to review their skills and achievements and build confidence and motivation. The latter was to enable customers to develop realistic job goals and present their strengths to employers in a variety of ways. Referrals to them were expected to take place primarily when customers reached the 13 week stage of a JSA claim.

# Appendix B

## The structure of JRFND

The new measures were intended to fit into the current arrangements for JRFND, as an enhancement of the previous service offer to those aged 50+. The following is a brief summary of the main elements of those arrangements as they stood at April 2010. For a fuller description readers are referred to the Department for Work and Pension's (DWP's) JRFND evaluation research reports.<sup>6</sup> The JRFND programme comprised four stages based on the length of JSA claim:

- Stage 1 from 0 to 13 weeks.
- Stage 2 from 14 to 26 weeks.
- Stage 3 from 27 to 52 weeks.
- Stage 4 from 53 weeks on.

Stages 1-3 are delivered by Jobcentre Plus. If a customer is still claiming JSA after 12 months they are then referred to a Flexible New Deal (FND) external provider for further support.

### Stage 1

- New Jobseeker Interview (NJI) with an adviser at the start of a claim.
- Signing of Jobseeker's Agreement (JSAg) – job goals and search activities.
- Assessment of Basic Skills – and referral to training if appropriate.
- Self-directed job search.
- Signing and Fortnightly Jobsearch Reviews (FJR's).
- Back to Work Session (BtWS) at six to nine weeks.

### Stage 2

- Second adviser meeting (20-30 minutes).
- Review of Jobseeker's Agreement.
- Assessment of training needs.
- Terms of job search extended.
- Weekly signing and review meetings for six weeks.
- Most disadvantaged 20 per cent get two Targeted Reviews (TRs).
- TRs include in-depth skills screening.
- Referral to skills support as appropriate.

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<sup>6</sup> Adams *et al.*, Jobseekers Regime and Flexible New Deal Evaluation: Stage 2 and Stage 3 Customer Surveys, Research Report No 694, October 2010. Vegeris *et al.*, Jobseekers Regime and Flexible New Deal Evaluation: A report on qualitative research findings, Research Report No 704, 2010 and Adams *et al.*, Evaluation of the Six Month Offer: A report on quantitative research findings, Research Report No 699, 2010.

### Stage 3

- Initial Review meeting with an adviser.
- Agreement of an Action Plan.
- Access to the six month offer.
- Activities: job preparation or pre-employment training; work trials; volunteering.
- Weekly job search review meetings for six weeks.
- Regular meetings with a personal adviser (flexibly, up to 3.5 hours).

### Stage 4

- FND delivered by external providers.
- Work preparation and job search support.
- Work experience.
- Fortnightly signing at Jobcentre Plus.

# Appendix C

## Research methodology

### Qualitative research

Because of the voluntary nature of the new measures, the absence of feasible control areas and the un-staged roll-out nationally, the research adopted a qualitative methodology. This comprised face to face in-depth interviews with the key actors in the advice and support process, namely job centre Plus advisers and JSA claimants aged over 50 years, plus a small number of interviews with DWP and Jobcentre Plus head office staff involved in devising and operationalising the new measures.

By engaging with all aspects of the delivery and experience of the measures, a full picture could be built up and assessments and experiences from both sides of the customer-adviser relationship be used to inform assessments of each other and of the overall process. Such an approach comes close to providing the richness of information that can be derived from case studies, and is able to present verbatim quotes from all respondents to illustrate findings.

### Interview coverage and sample selection

#### **DWP head office interviews**

Five head office interviews were carried out with DWP and Jobcentre Plus staff to explore the rationale and expectations behind the new 50+ measures. These interviews included one member of the DWP policy team from the Extending Working Life Division, the Product Expert from Jobcentre Plus Head Office, a member of the Jobcentre Plus Regional Transformation Team, a Jobcentre Plus District Implementation Manager, and a specialist 50+ training consultant from Age UK who had been involved in devising the content of the workbook for advisers.

#### **Jobcentre Plus adviser interviews**

A total of 35 interviews were carried out with Jobcentre Plus advisers, comprising seven from each of five districts. The districts included one in Scotland and one in Wales. London was not included because it was felt that London-specific factors might obscure the overall picture. The districts selected were all FND phase 1 districts. In these districts, the new 50+ measures were anticipated to have been introduced to a more 'steady state' of delivery of Flexible New Deal and thus be less liable to 'noise' from other changes obscuring the picture regarding these measures in particular. Interviews were carried out in a number of offices in each district, ranging in size from the small to the very large.

The attempt was made to obtain a broad spread of adviser 'types' among respondents, both in terms of their experience of the new 50+ training and the stage of JRFND within which they typically had most of their customer contact. However, the interviews formed a qualitative sample and can not be taken as being statistically representative of Jobcentre Plus.

#### **JSA customer interviews**

A total of 60 interviews were carried out with customers aged over 50 years who had started a JSA claim at some time in the period since April 2010, and who were recorded as having received one of

the three new measures. Because numbers of potential respondents recorded in the administrative data were low, customer details were obtained not only from the five districts in which advisers were interviewed but also from some neighbouring districts.

The sample was 'stratified' by take up of the three measures, by age band (50-54 years; 55-59 years and 60-64 years), and by gender, with equal numbers of interviews being sought in each of the cells of the matrix created by these three characteristics, though again the sample can not be taken as being statistically representative.

## Customer recruitment

The contact details of 638 customers were made available from the DWP administrative data. All these customers were sent a letter explaining the research and offering the chance to opt out by returning a pre-paid reply if they preferred not to be contacted further. It was explained that larger numbers of people were being written to than would eventually be interviewed, and that they may be contacted by telephone at a later date to arrange a date and time when a researcher could visit them in their home and conduct an interview. At the time of making telephone contact it was explained that a cash gift of £20 would be given by way of thanks to those agreeing to participate in the research.

The 50+ JSA customers proved to be a relatively 'engaged' group of potential research respondents. Many people used their postal opt-out (23 per cent of the entire customer data sample) and a higher than expected number of customers chose pro-actively to opt- in to the research (four per cent) although it was not possible to use all opt-ins due to sub-group sampling requirements. Overall, 145 people opted-out by post and an additional 14 people declined to take part when later contacted by telephone. A further 13 of those approached proved to be un-contactable due to inaccuracies with the contact information, and seven were unavailable due to illness or holidays. Among those customers with whom telephone contact was attempted, in excess of 35 per cent were successfully recruited to take part in the research.

## Achieved customer interviews

A total of 60 customer interviews were required. The initial target was to try to interview 22 customers in each of the age groups 50-54 years and 55-59 years, and 16 customers in the age group 60-64. The lower number in the top age group was to reflect the very much smaller numbers in the data sample who were available to contact and the fact that they were all male. Every individual in this age band was contacted and 12 interviews were eventually achieved. Even this reduced number required a very high recruitment success rate (40 per cent after postal opt-outs). The four interviews that could not be achieved in this group were undertaken with customers in the other two age groups (two in each). The final breakdown by age band was 24 interviews with customers aged 50-54 years, 24 with those aged 55-59 years and 12 with those aged 60-64 years.

There was also a shortage of available customers for recruitment in some other areas of the sample matrix. The preponderance (58 per cent) of customers marked in the data sample as having had a work trial, rather than either of the other two measures, resulted in slightly higher numbers of work trials among achieved interviews. The final breakdown by measure was 16 interviews with customers who had received an extra adviser interview, 21 with those who had been fast tracked to Stage 3 of JRFND, and 23 with those who had undertaken a work trial.

The final breakdown by gender among those aged between 50 and 59 years was: 25 males and 23 females. All the customers aged 60-64 were males.

## Analysis

Analysis of the interview material was undertaken in a staged process commencing with a de-briefing meeting of all field researchers to note and discuss issues and trends perceived to have emerged from their fieldwork experience. Individual interviewers undertook preliminary analysis of the interviews they had carried out, according to an analysis pro-forma, and the de-briefing meeting brought this material together, challenged perceptions and tested the warranties of individual interpretations against the experience of the whole team.

Material from this preliminary analysis formed the basis for an analysis and coding framework that informed a composite analysis of all interview material using the qualitative research analysis software MaxQDA.

With removal of the Default Retirement Age and the rise in State Pension Age, there is an expectation that people will in future have longer working lives. This presents a challenge to Jobcentre Plus in that it can expect an older client base in coming years.

This report presents the findings from a qualitative research study, carried out by Insite Research and Consulting, looking at the effects of measures introduced in April 2010 to help Jobcentre Plus advisers deliver an enhanced service to those aged over fifty and claiming Jobseeker's Allowance (JSA).

The additional support introduced for the 50+ took the form of three voluntary measures: access to work trials from day one; entitlement to an extra 30 minutes of adviser time; and eligibility to be fast tracked to Stage 3 of JRFND. Enhanced adviser training was introduced at the same time to support the changes.

The research was carried out between October and December 2010 and comprised 100 in depth, face to face interviews: five with Policy staff at the Department for Work and Pensions (DWP) and implementation staff in Jobcentre Plus; 35 with Jobcentre Plus advisers in seven districts in England, Scotland and Wales; and 60 with JSA claimants aged over 50 years who had experienced one of the voluntary measures in the six months prior to their interview.

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