



Improvement

Customer led transformation programme

Case study – Lewisham

Worklessness

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The Customer Led Transformation programme

Lewisham's work has been funded under the Customer Led Transformation programme. The fund aims to embed the use of Customer Insight and Social Media tools and techniques as strategic management capabilities across the public sector family in order to support Place-Based working.

The Customer Led Transformation programme is overseen by the Local Government Delivery Council (supported by Local Government Improvement and Development).

The fund was established specifically to support collaborative working between local authorities and their partners focused on using customer insight and social media tools and techniques to improve service outcomes. These approaches offer public services bodies the opportunity to engage customers and gather insight into their preferences and needs, and thereby provide the evidence and intelligence needed to redesign services to be more targeted, effective and efficient.

About the London Borough of Lewisham

Some 260,000 people live in the London Borough of Lewisham. Lewisham has a relatively young population with an average age of 35 years. Children and young people aged 0-19 represent about 25 per cent of the population. As a locality, Lewisham is the 15th most ethnically diverse local authority in England. Two out of every five Lewisham residents are from a ethnic minority background. There are over 170 languages spoken in the borough.

Although there is a degree of affluence, the borough does have high levels of socio-economic deprivation. Lewisham is ranked 39th for deprivation in England, with one in three 'super output areas' (SOAs) in the 20 per cent most deprived.

The rate of Jobseekers Allowance (JSA) claimants rose from 3.2 per cent of the working-age population in July 2008 to 5 per cent in December 2009. Lewisham has the highest rate of lone parent households in London, 17.8 per cent of all households.

The complex needs and social challenges faced by Lewisham's residents require public agencies and their partners to have a deep and shared understanding of the dynamics of population, place and history. All have an impact on outcomes for citizens. Tackling disadvantage systematically requires agile and flexible services to be targeted effectively and personalised around the differing needs of individual citizens, families and communities.¹

¹ Adapted from 'Total Place in Lewisham', page 2.

Objective

As part of their Total Place project, the London Borough of Lewisham worked with their local partners on a customer insight project to better understand their shared customers' experiences of local public services. Lewisham's Total Place project addressed several themes, including worklessness. (For an outline of how Lewisham and their partners used customer insight to redesign their services for ex-offenders, please see accompanying case study).

Lewisham's Total Place project sought to understand and calculate the overall costs to partners across the public services the services and support they provide to out of work citizens. Their customer insight work sought to understand the current configuration of services and how this felt for these customers. It illustrated how the target customer group experience fragmented services and how the outcome can be unsatisfactory and frustrating for both parties.

To view these case studies and videos that were produced by this work, visit:
www.lewishamstrategicpartnership.org.uk

Background

The Total Place pilot and associated Customer Led Funding for their customer insight work provided Lewisham the opportunity to investigate an issue that had become apparent at an event in early summer 2009. The event was organised by Lewisham Local Strategic Partnership (LSP) to help citizens during the recession and brought together a range of service providers relating to debt advice, training, and employment. Employers could also come and collect information and there also was an opportunity to register for training courses.

A wide range of employment providers were present, and many introductions between providers were made during the day. This led the project team to question how well the different organisations knew each others' roles and responsibilities in supporting citizens, whether those out of work were receiving the appropriate support and referrals and whether their work was joined up so they effectively supported these citizens.

Organisations providing employment support service in Lewisham during the course of the project included:

- the Department for Work and Pensions (DWP) and Jobcentre Plus
- the Learning and Skills Council, now replaced by the Skills Funding Agency
- the London Development Agency, which also funded support across London
- the Working Neighbourhoods Fund, led by the borough
- a range of community and voluntary sector organisations.

However from the citizen's perspective, this range of different organisations creates a maze of provision which citizens often find difficult to navigate. Although Lewisham is not always the commissioner of the service, they see themselves as having a role to play in ensuring that the money is invested across the partnership makes a difference to those identified as workless in the area.

Given the range of providers, Lewisham began to consider whether reviewing and redesigning the services being commissioned would improve outcomes for service users. This is one of the hypotheses that Lewisham sought to test.

Lewisham began the exercise with several general but related questions including:

- Are people being appropriately assessed?
- Are referral systems between service providers working well?
- Is support being duplicated?
- Are services based on the needs of individuals and therefore 'personalised', or are people being sent down standardised "default" routes which do not meet their needs?

Lewisham recognised that since the organisations involved do not share customer data or track customers progress between their organisations, the only source of a single, joined up view of the customer's journey are the customers themselves. Hence, engaging service users directly is essential to better understand their experience of services and how well they deliver the desired outcomes.

Governance

Lewisham's Total Place programme was overseen by a subset of Lewisham's Public Services Board, which in turn reported to the LSP Board. The Total Place programme board comprised:

- the Chief Executive of the council
- the Deputy Principal of Lewisham College
- External Relations Manager, JobCentre Plus
- the Chief Executive of the Primary Care Trust
- Borough Commander, Lewisham Police.

As well as reporting to the Total Place Programme Board, regular updates were given to the LSP board. Operationally, the purpose was to check that the work was progressing in the right direction, and to solicit feedback.

The outputs of the customers insight work were fundamental to helping the Total Place Board get a clear objective understanding of the current process that citizens went through, and the intelligence informed recommendations Lewisham's Total Place report makes for service redesign.

Resourcing the customer insight work

The core of the project team comprised Lewisham's head of strategy and a principal policy officer, also heavily involved in supporting the wider Total Place programme. The customer insight project team also included:

- the borough's employment development manager
- Lewisham College
- a representative from JobCentre plus
- a representative from Community Education Lewisham
- a secondee from OPM who was getting work experience supporting the Total Place programme.

The Customer Insight project was managed by the principal policy officer working to the head of strategy. The principal policy officer also had a role overseeing Lewisham's other three Total Place work streams and managing ongoing LSP work.

Between October 2009 and February 2010 approximately 15 to 20 per cent of the principal policy officer's time was dedicated towards customer insight. However, the customer insight workload varied according to the stage of the project.

“Unless you actually go out and ask people, and find out peoples' experiences then it's really difficult to test these things.”

Joel Hartfield, Principal Policy Officer, London Borough of Lewisham

Approach

The only means of gaining a complete picture of the customer's experience of using services was to learn from customers directly. Lewisham set out to gather this insight through in-depth interviewing with over 50 service users, coupled with meetings and workshops with the providers of services to understand their perspective. These interviews typically lasted one to two hours and sought to capture the following information on the respondents:

- personal circumstances, ie:
 - where they live
 - their family circumstances and history
- personal story ie:
 - how long they have been out of work, and the nature of their typical day
 - their perceptions of work and jobs
- their views on the incentives and disincentives relating to finding work
- the guidance and support they have used in looking for work
- their experiences of searching for work
- their perspective and experience regarding:
 - travel
 - course
 - service providers
 - skills
 - beliefs and confidence levels
- their perception of challenges and barriers
- their future outlook and expectations.

To conclude the interview, the researcher thanked them for their time and reminded them where they could find the results of the project.

Based on the success and insights from this first phase, Lewisham then used their funding to engage in more in-depth ethnographic work with service users to gain a more detailed picture of their experience. This comprised researchers spending considerable time with customers and observing them interacting with the various service providers, and recording their reaction and views. This enabled Lewisham to build up a detailed picture of the customer's actual experience as well as identify:

- the various touch points
- the information the customer was asked to provide
- the advice or signposting they were given
- how the process felt from the customer's perspective
- the difference the services were making to their prospects of finding work.

Phase 1: In-depth interviewing

The initial objective was to paint a picture of what services look like for users through in-depth interviewing to help each the partners understand the citizens experience of their particular service plus identify the points where they had to duplicate processes, where they were given conflicting advice or where they were handed off to another service area.

Lewisham engaged the consultancy Nicholson McBride to undertake this work and they interviewed more than 50 service users and providers to get a sense of their experience of the system. The service users shared their views, stories and feedback on the experience of services over a period of one to two hours with the researchers.

Interviews took place at providers' premises. Interview write-ups were then circulated among the project team to inform emerging thinking (see 'Findings' overleaf), and helped to shape the ethnographic work that followed.

The first challenge was to access a representative sample of service users from a potentially diverse client group with a limited budget to ensure that they provided a representative picture.

The project team began by contacting appropriate members of the LSP. These included:

- JobCentre Plus
- Lewisham College
- the DWP and JobCentre Plus's contracted providers
- Working Neighbourhood Fund contracted providers.

The project team then asked providers to suggest service users based on some key criteria. The project was looking for service users from a range of backgrounds, ages, ethnicities, and benefits types. The research also needed to get a sense of their experience of the system, and so had to capture a representative and informative sample of 'experiences'. The project was specifically looking for service users that had been passed around the system from one provider to another. They also sought a mix of service users, including those who have been out of work for a long time with those who were more recent victims of the recession.

While identifying a sample of appropriate respondents, the project team also worked with the consultancy to develop the interview questionnaire.

In order to work, the questionnaire needed to:

- include questions that the client group would be comfortable answering
- offer the interviewer some flexibility during the interview process to mix and match questions according to the background of the respondent.

Developing the questionnaire was an iterative process. Lewisham began by articulating the hypotheses they wanted to test. Successive drafts of the questionnaire were developed and circulated among the project partners.

Although Lewisham took the lead in liaising with the consultancy on the questionnaire, all the members of the project team had an opportunity to provide feedback. There were numerous iterations amongst the project team over a three week period before the final set of questions were agreed.

In parallel, Lewisham coordinated the other project partners and worked with them to schedule interviews. The bulk of the interviewing was undertaken during a six week period.

A mix of interviews were conducted, including:

- interviews lasting one to two hours
- focus groups lasting one to two hours
- in-depth half day interviews.

Given the pressing timescales of the Total Place work, the findings from the insight work were shared with the project team continuously as and when it arose. The principal project officer often received daily updates on the emerging findings which enabled them to formulate recommendations and hypotheses as the work progressed.

To conclude the in-depth interviewing phase of the work, the project group held a session where the consultants presented their findings. The outcomes from this discussion were then summarised in a report which was fed up to the Total Place programme board for discussion and agreement.

The project team then organised an event for providers and commissioners to understand the perspectives of the various partners involved. They also set out to help develop a shared understanding of how funding streams are managed and how services are commissioned as this was a key part of the investigation and would help with the development of recommendations to redesign these in the future. Since service providers and commissioners know more about these issues than the service users, engaging them in the process was essential.

Furthermore, service providers can be seen as customers of the commissioners. They generated the crucial insight that the extent to which they can be flexible and adapt services around the needs of citizens is constrained by the overarching commissioning structures. At the event, Lewisham asked the service providers how they would do things if funding streams were managed differently.

Following the presentation of the findings to the Total Place programme board, the report was also raised with the full LSP Board for their endorsement of the findings and next steps.

Findings

A major lesson that emerged in the early stages was that some groups – particularly those on incapacity benefit claimants and lone parents – are typically out of work for the long term and support often fails to reach

them. Lewisham discovered that there were 12,000 incapacity benefits claimants, costing the public purse £24 million a year (2008 to 2009). While incapacity benefits costs more than Jobseekers Allowance, most publicly funded support targets jobseekers allowance claimants.

Furthermore, this initial phase revealed that relatively little of the support that is available in the borough is aimed at lone parents, even though Lewisham has a high lone parent population. These findings lead Lewisham to the hypothesis that there should be more local influence on commissioning to better meet local need.

Phase 2: Ethnography

Ethnography is defined as the study of human behaviour in its natural context, involving observation of behaviour within their typical setting. In Lewisham's case, this involved researchers spending considerable time interviewing and filming a small number of service recipients as they went about their daily lives. This ethnographic work was conducted between January and March 2010, and a series of case studies and videos were produced (for further information visit: www.lewishamstrategicpartnership.org.uk).

The initial interviewing proved some of Lewisham's hypotheses while also suggesting that people's backgrounds and their underlying issues were not being taken into account in the design and delivery of services to them. The project team suspected that there was a tendency for support to be inflexible and to present options such as confidence building courses or CV writing courses that, while not necessarily unhelpful, did not always meet recipients' fundamental needs. For example mental health issues, physical health issues,

“Ethnographics work, so it was a good way of sort of building up a bit of trust, understanding what makes them tick rather than just sitting down with someone for an hour, they may not open up as much as they would in this way.”

Joel Hartfield, Principal Policy Officer, London Borough of Lewisham

housing issues, debt problems or childcare needs were often cited as the real barriers preventing people looking for work. However, these were being overlooked or ignored by the current system.

One lesson from the first phase was that it was difficult to get to the heart of someone's barriers and issues in an interview lasting only an hour or two. Hence the rationale for conducting more in-depth ethnographic research to enable a more detailed exploration of the emerging issues from the first round of interviews.

The ethnographic work commenced in December 2009, following funding from the Customer Led Transformation programme. Lewisham commissioned OPM to write nine case studies based on ethnographic research and produce a ten-minute film summarising the findings. The consultants spent a total of between half a day to a day with each respondent for the case studies, and longer with those participating in the filming. The filmmaking was based on spending a day or more with the subject, filming them as they went to their training course, chatting to the tutors, having lunch, etc.

The film 'Journeys to work. Experiences of the welfare-to-work system in Lewisham' can be viewed at:

www.lewishamstrategicpartnership.org.uk/journeyvideo.asp

The consultants worked with respondents to develop a map charting their life and experience of services (See Figure 1 "Chloe's Life Map" below).

An important factor in recruiting respondents for the research was to ensure they represented different groups within this community and therefore were likely to have had a variety of experiences which reflected the local community. By mapping the experience of these respondents Lewisham would have a real understanding of the typical experiences of citizens from their community. They therefore worked with the consultants to develop the following criteria.

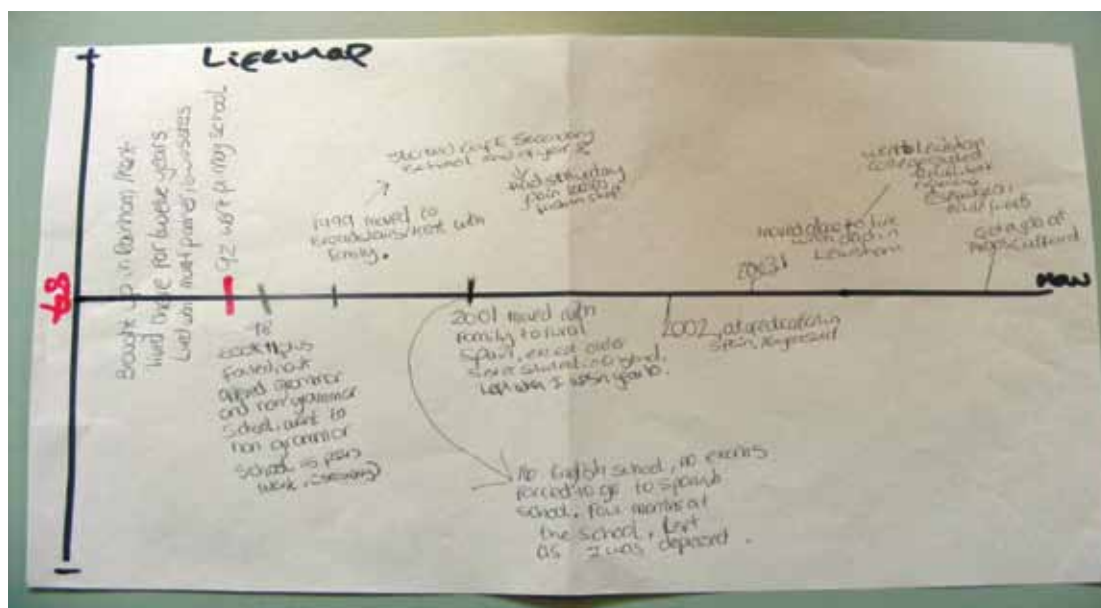
The project sought to speak to:

- lone parents
- in-capacity benefit claimants
- young people aged 19 to 24
- members of ethnic minority or refugee communities
- adults with learning disabilities
- adults with mental health issues
- carers.

These groups often have a more complex personal history and circumstances and often become workless and reliant on the state for the longest periods of time.

To build a relationship of trust between the interview and a participant and to draw out detail, the interviews took place over two days. Visual and participatory tools such as life maps, worklessness maps and geographical location exercises complemented a more traditional depth interview.

Figure 1. Chloe's Life Map



Five people were chosen to be filmed for the video. Filming enabled the project to showcase the stories of case study subjects at a deeper level. The project employed a video ethnographer who used observational documentary techniques to recall the way people live in considerable detail. Spending two days with the respondents helped the ethnographer understand their patterns, habits, beliefs and motivations. This video was filmed with three of the written case study participants and two new additional participants.

Once again, the service providers supported the recruitment of participants. The consultants briefed the service providers about the sample composition and a screening sheet was used to establish the suitability of prospective participants. When recruiting, the project also considered whether the participant would be available to take part in the research at short notice without disrupting their search for employment.

The final cohort of participants included the following (names have been changed to maintain anonymity):

- Bill, a 52-year-old Afro-Caribbean male currently suffering from depression. This is the second period of long-term unemployment. He has been unemployed since 2004.
- Chloe, a 22-year-old female lone parent, unemployed since she left her last job to have a child. She was actively searching for employment and volunteering at numerous organisations for the last 18 months. She has recently found part-time work that she hopes to be able to continue.
- Kate, a mixed race female in her late 30s with some speech and learning difficulties; she also cares for her mother.
- David, a 56-year-old white British male who has been unemployed for seven years. He holds a university degree and has had work experience but suffers from confidence problems and depression.
- Debra, a 49 year old female who has been unemployed to 26 years. She had a 20 years substance abuse problem followed by a period of mental health care. She is now volunteering in the field she wishes to pursue as a career.
- Ella, a 23-year-old female with a complex family and personal history. For a number of years she has been seen by providers who have tried to enhance her skills through training courses.
- Mary, 55-year-old female lone parent, unemployed for 30 years. She has now found employment and has been working for a little over a year.
- Abby, a 43-year-old black British female ex-offender with a history of substance abuse. She has been unemployed since 1995 before she was incarcerated. She has been out of prison since 2005 and has not worked since. She currently has an official caring role to her mother and has undertaken training courses to gain new skills.
- Sue, 45-year-old female lone parent. She has been looking for work since the mid-1990s and has undertaken training and work placements.

As well as providing extra evidence to support the Total Place findings, the written case studies and two films also offer an engaging way of sharing the findings with other professionals working in the field.

Findings

The ethnographic work has produced many insights. All respondents emphasised the importance of having a case worker or adviser willing to spend time covering their individual circumstances and characteristics. The respondents reported that they had been allocated several advisers and case workers. However, no one caseworker took responsibility for leading or coordinating or customising the support. Therefore the customer often had to repeat the same information to each of these separate case workers, and develop multiple action plans. They reported that a lack of understanding of their circumstances often leads to inappropriate advice and support measures being offered.

“There’s a variety of findings, but the main finding that emerged from the customer insight work was around the sheer complexity of the system. If you are out of work, you are kind of thrown into this system of support and you have very little ownership of the support that you receive.”

Joel Hartfield, Principal Policy Officer, London Borough of Lewisham

Service users also gave the following feedback:

- Users report being sent on similar courses repeatedly or being directed towards courses that were inappropriate or unfeasible (eg such as those with inadequate childcare provision).
- Service users also complained that the referrals and pathways that the support took often seemed predetermined and detached from their personal goals or targets.
- Users also felt that providers sometimes underestimated their capabilities and resourcefulness.
- Several interviewees described the system as “confusing” and many expressed that they felt they had to “fight” their way through the system. Some respondents reported times when they had felt like giving up, resulting in reliance on welfare benefits.

The rigidity of conditions and criteria relating to apprenticeships or employment is also a challenge. Those with mental health issues emphasised how inflexible processes and systems (particularly regarding training and apprenticeships) in the mainstream of the welfare to work system can cause anxiety, prevent progress and potentially result in total disengagement from the services (and as a result continued worklessness).

The respondents also made a number of suggestions for how services could be improved. According to respondents, gaining a greater understanding of individual circumstances would not necessarily require significantly more time from providers, just an improved approach to assessment. Moreover one participant suggested that by

understanding an individual's circumstances and needs better, the provider might not need to deliver as much or as intensive support to do them – sometimes someone “just needs a bit of guidance”.

Interviewees also emphasised that the order in which people's problems are tackled by providers is critical to the success of the support. For example, addressing mental health issues or housing issues should be at the forefront of welfare to work measures.

One critical success factor that all interviewees emphasised was the benefits of having consistency and continuity of contact with a single dedicated case worker or adviser. This enables them to build trust and enables the adviser to get to know their circumstances well enough to offer appropriate support. This would require a different approach to staffing by some providers.

The nature and style of support also influences its chances of success. Those with more complex personal histories emphasised that they needed “reassurance”, “support”, “more informal” help from providers, who should be “non-threatening”, “more receptive to my needs”, and “treat me like a human being”.

Interviewees emphasised that the providers that had been most successful in helping them find work or training had “started to believe in me”, and “focused on what I was capable of doing” instead of taking the usual “sign here approach”. There was a common belief among interviewees that providers tend to focus on outputs rather than outcomes.

Respondents emphasised the benefits of volunteering. Intriguingly, this was without any of the research directly questioning participants about volunteering. Five of the nine interviewees reported the positive

effects of undertaking voluntary work and the impact it had on improving their work readiness and moving closer to the labour market. Respondents regarded voluntary work as preparation for a longer term career and as a way of gaining experience with less pressure and anxiety. Participants described volunteering as giving them: “experience”, “reward”, “confidence”, “clarity” and as making them feel “reliable”, “useful” and that they could “give something back”.

These findings were reviewed by the Total Place Board and incorporated into Lewisham's final report ‘Total Place in Lewisham: Public services working together with citizens for better outcomes’, approved and published by Lewisham's Strategic Partnership. The report proposes a number of practical steps to improve the outcome of citizens, including:

- streamlining regulation to lessen the bureaucratic burden on service providers and enhance their ability to adapt to just needs
- aligning performance management arrangements, to help ensure that all the different service providers are seeking to achieve similar or complimentary outcomes
- actively redesigning service boundaries around the needs of customers
- engaging service users and pursuing user directed change.

Benefits to the council

The project has enabled Lewisham to make the case to central government – both through the Total Place report and through ongoing dialogue – that there are opportunities, for much closer commissioning between central, regional and local agencies.

“The work has helped me realise that you should not make assumptions about things, and that there is no substitute they directly testing out your thinking with individuals who have gone through the experience rather than relying on the views of professionals.”

Joel Hartfield, Principal Policy Officer, London Borough of Lewisham

The project has given Lewisham a strong understanding of the issues and barriers affecting its out-of-work residents, and its provider base. This will help the council and its partners to be better prepared for the implementation of the Government’s reforms of welfare-to-work support, such as the introduction of the Work Programme in 2011, and the migration of some Incapacity Benefit/ESA claimants and lone parents onto Jobseekers Allowance over the next four years.

The work has also helped Lewisham to better coordinate the support offered to individuals with complex needs. A forum has been established which includes not only employment and skills providers, but also

agencies who have a role in bringing people back to work, albeit not their primary role (for example, health or housing providers). The forum provides training opportunities for staff working with particular client groups, as well as information sharing and networking opportunities.

Benefits to customers

The work has demonstrated to public service providers the sheer complexity of the system facing customers. Following this work, Lewisham is working with partners to test out a model providing customers with a greater degree of ownership of the support they receive.

Customers stand to benefit from:

- an individual budget, which they use (working with a case worker) to purchase goods or services which will tackle their own personal barriers to employment
- greater provision of personal one-to-one support
- more local design and commissioning of support services.

The ambition is to offer customers more choice and control over the support they receive, and to address the wider, more fundamental barriers that prevent people getting to work.

Lessons learnt

The project team highlight the following 'implementation' lessons:

- Invest a lot of time up-front on getting the lines of enquiry and questions right – Lewisham regard this as crucial.
- Ensure the sample you are targeting is sufficiently wide and inclusive to be able to test your hypotheses. Lewisham developed criteria for respondents for both phases of work, and collaborated with their partners to ensure they reached people with representative "experience".
- Deploy consultants with the specific expertise and skills that the work requires. Lewisham used two different consultancies for the separate phases, but ensured the outputs from the first phase informed the second.
- Maintain regular contact with those doing the fieldwork. Customer insight work is often about testing hypotheses, and it is necessary to keep up-to-date with findings to ensure you have an idea of where things are going along the way. Where consultants are undertaking the work, the project team needs to set aside time for updates.
- Work iteratively. Rather than spend all your resources all in one go, Lewisham recommends dividing the work up into two phases where the second phase tests the conclusions and recommendations from the first.

One outstanding issue is that Information sharing between providers remains weak. The organisations' and service areas' interpretation of data protection laws means that people are reluctant to share client information. Since data resides on numerous separate databases and is typically not

shared, it can be difficult to see how a person is being referred from one provider to another.

Next steps

The Customer Led Transformation programme work was fundamental to supporting their Total Place pilot work. It enabled them to better understand the real experiences of representatives from a key customer group. The resultant insight has also enabled much closer collaboration across the partner agencies, such as through the forum mentioned above and other Working Neighbourhoods Fund projects.

The insight generated by this work is helping to shape Lewisham's and their partners' approach to piloting of individual budgets. Lewisham has also recently started working with the DWP to co-design approaches to tackle worklessness.

Lewisham are also working to develop and embed customer insight skills into their working practices. For example, Lewisham have worked with the Design Council on a project addressing homelessness whereby they gave camcorders to case workers working with homeless people and filmed their daily work and interviewed service users.

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