



Planning for Later Life



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Overview of Ageless Thanet and the Planning for Later Life service

Ageless Thanet is a National Lottery Community Fund project, part of the Fulfilling Lives: Ageing Better programme. In 2015 we were awarded £3 million to reduce loneliness and social isolation in the 50+ community in Thanet.

Planning for Later Life is led by our partner Citizens Advice Thanet. It gives intensive support on a one-to-one basis with people facing difficult or challenging circumstances. The support helps people deal with a range of issues they may face in later life that can lead to them becoming isolated or lonely, such as; adjusting to retirement, changes in finances, becoming a carer, or a sudden change in health.



Ageless Thanet Life Planning team

The Life Planners take a holistic approach, looking at all aspects of a person's life to see how best to support them. This could include emotional support, accompanying individuals to groups or appointments, helping them to budget their finances and access benefits they may not realise they are entitled to.

“The extra money has helped me feel more independent and as a couple has given us more financial stability. I am no longer anxious regarding how we will manage.”

Life Planning Client

Whilst the nature of the support is short term (up to 12 weeks), it has a long term impact. The Life Planners work with the individual to provide them with the means to make the necessary changes in their life. As the client is involved in making the changes under the guidance of the Life Planner, they feel empowered to move forward with their life.

Challenges and solutions

Community Engagement

When the project began, the Life Planners took on the role of promoting the service within the community, building relationships with other organisations and groups. This worked well at first, but as demand for the service grew, it proved difficult to keep this up. In December 2015, Citizens Advice Thanet employed a Community Engagement Officer to work solely on promoting the service and managing relationships with local organisations and groups. This was a temporary role to build on the momentum gained in the initial few months as the project began, and was so successful that a full time Community Engagement Officer was employed to work across the whole project.



A key success of the role was the strengthening of relationships with GP surgeries. This culminated in us holding regular drop ins at key surgeries across Thanet.

Other organisations were more reluctant to engage, in part due to fears that we were competing for funding. The Community Engagement Officer developed relationships with individuals in the organisations who then became advocates for the project and actively referred into the service. This strengthened our co-production ethos, which is at the heart of the project's success.

Geographic restrictions

When we started offering this service in 2015, it was available to residents in four wards of Thanet: Birchington North, Birchington South, St. Peter's and Viking. These areas were chosen because they had the highest population of people over 50.



We quickly realised that this geographic limitation caused some significant problems. A lot of referral partners did not know what ward their client lived in. The necessity of having to spend extra time to identify which ward their client was in, resulted in a lack of referrals, as well as incorrect referrals for people who lived outside the catchment area. It would have facilitated easier partnership working if our catchment areas had been postcode specific, as this information is often readily available to referrers.

Individuals who made self-referrals, but lived out of area, did not understand why they were unable to access the service and felt discriminated against. In 2016, thanks to the test and learn ethos endorsed by The National Lottery Community Fund, we were able to expand the delivery of the Life Planning service across the whole of Thanet. The widening of the service was successful and enabled us to develop better relationships with referrers.

Marketing and communications

We discovered that people didn't really understand what the service could offer them. As a result we stopped using jargon words to describe the service, and instead focused on the "trigger points" at which a person might need support from a Life Planner.

For example, asking questions such as "Are you recently retired?" "Do you need support adjusting to a change in your health?" engages people as they can relate it to their own lives. This is more effective as clients do not necessarily consider themselves as a person who needs to "plan for later life".

Reluctance to complete evaluation questionnaire

Clients were asked to complete a questionnaire prior to starting the service and then again once they stopped working with the Life Planner. In order to give us robust and academically validated statistics, we needed to reach a relatively high number of completed forms; so whilst it has never been compulsory for people to complete the questionnaire we did need to ensure that as many people as possible took part in the study. Many were concerned that providing certain data such as their postcode, would mean that it was not anonymous.

Our Life Planners took time to explain to the client that the survey was completely anonymous. They explained it was an academic study which we hoped would potentially help more people like them in the future. This reassured clients and we saw more people agree to fill in the questionnaire once we started working in this way.

Relationships with clients

When working with vulnerable people and supporting them with challenging situations it is very important to build up a level of trust. It is also important that members of staff are non-judgmental, impartial, and are good listeners. Lots of clients expressed that simply having someone to talk to about their problems benefitted them greatly.

“ It has been a lifeline for me in my financial and social situations. Just having someone to talk to has been so important. ”

Life Planning Client

However, rapport built up from a professional relationship can sometimes be mistaken for friendship, particularly when clients are alone and desire companionship. In order to manage clients' expectations it was important to reiterate that the Life Planner could only support them for a set period of time. Professional boundaries must be maintained to protect both the client and member of staff, but also to ensure that we did not create dependency on the Life Planner.



Missed appointments

At the beginning of the project there was an issue with clients not attending appointments, particularly if they had been referred from an external organisation. To minimise this, the administrator rang the client prior to the appointment to remind them to attend. More recently mobile phones have been used so text message reminders could be sent. Both of these methods have proven to be effective in reducing the number of no-show appointments.

Wellbeing of Life Planners

The Life Planners work with many clients who are experiencing distressing circumstances and we had not anticipated the impact this would have on their wellbeing. As advisors with Citizens Advice, the Life Planners had training on working with vulnerable clients and those with mental health conditions. This has helped them feel prepared should they encounter a client in crisis. In addition to this, group counselling was organised, which helped them to realise their capacity as advisors and put their own personal boundaries in place.

What did we learn about Planning for Later Life clients?

From November 2015 until September 2019, the Life Planners worked with 1014 people, 697 of whom completed a baseline questionnaire.

57.5%

of clients were female

42.5%

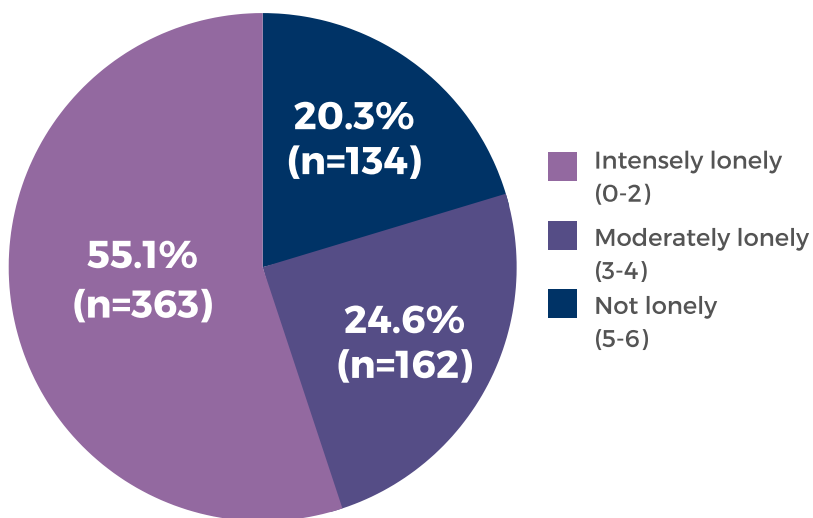
of clients were male

65.7

average age of Life Planning client

Engaging with men has been a huge problem across the Ageing Better programme. More men have engaged with the Planning for Later Life service than other areas of the Ageless Thanet project. We can't say for certain why this is, but Citizens Advice is a trusted organisation and as the support is advertised as one-to-one, perhaps this may have encouraged more men to seek advice through this part of the project.

Loneliness classification before Planning for Later Life service



We used the De Jong Giervald 6-item loneliness scale to assess emotional and social loneliness of clients. This scale has two subscales: emotional loneliness and social loneliness. The scores from these two subscales are added together to form a total 'loneliness' score, which ranges from 0-6. From the data on the left, it is clear that the service is reaching those who are either at risk of, or currently experiencing loneliness.



53.2%
live alone



82.3%
have a disability



28.8%
are carers



61.6%
are not part of any groups



9.2%
never meet up with friends or family

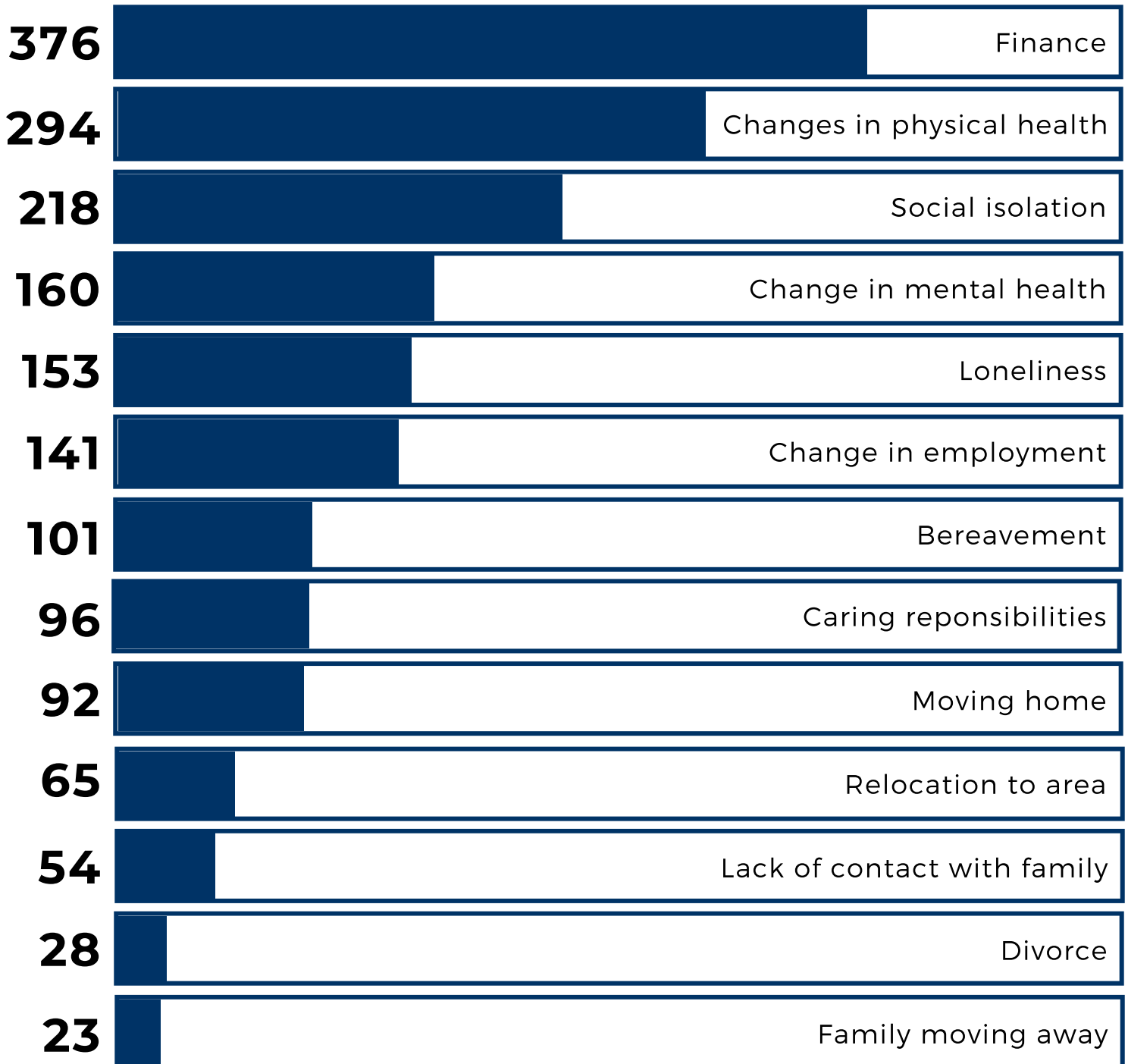


22.7%
have 0-1 friends

Reasons for referral

The three most frequently reported reasons for a person contacting or being referred to the service were 'finance', followed by 'changes in physical health' and 'social isolation'. Clients could select more than one answer for this question.

The chart below displays the full breakdown of all the answers



Impact

The following is based on 422 people who completed both the baseline and follow-up questionnaire. The data was collected between November 2015 and September 2019.

58.8%

saw a reduction in feelings of loneliness

77.4%

reported an increase in quality of life

73.8%

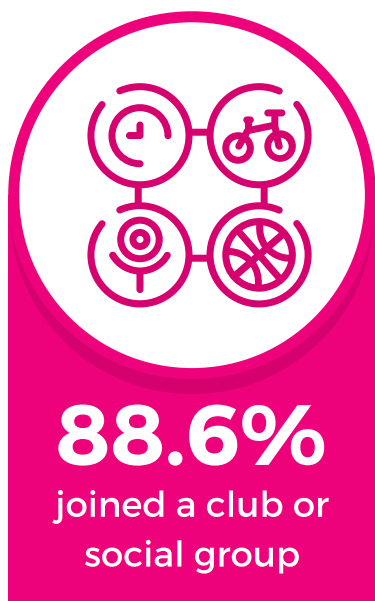
reported an improvement in their mental health and wellbeing



**Over
£1.6 million
in income maximisation!**

This data is from November 2015 until June 2020. The Life Planners worked with clients to help ensure they were claiming the benefits they were entitled to, which included assisting with applying for backdated payments.

Maximising clients' income made a huge difference to their quality of life. It meant that they felt less stressed about their financial situation, and could afford to do things such as joining in with activities, which in turn reduced feelings of loneliness and isolation.



61.6% (n=428) of those who completed a baseline questionnaire reported that they were not a member of any clubs, social groups, organisations, or societies.

Of those, 317 then went on to complete a follow-up questionnaire which showed only 36 were not part of any groups. This means that since starting the Planning for Later Life service, 281 people joined a club or social group.

Building connections with new people, and taking part in activities you enjoy will undoubtedly have contributed to Life Planning clients seeing an improvement in their quality of life and mental health and wellbeing.

“ All my financial
anxieties resolved.

I am able to meet up with friends
for a meal, before due to lack of
money I had to decline.

I have been able to do things that
I have never done before
such as have a manicure.

These small things make me
feel so much better about myself.

**It has made my life
MORE FUN”**

Life Planning client

WAR VETERAN GIVEN NEW LEASE OF LIVE



STEPHEN

Stephen contacted Ageless Thanet when his friend suggested he should see the Life Planners. At the time, Stephen was homeless, living in a tent on a local beach with no money, little food and no hope of things improving. He said "My life was a nightmare, I had been sleeping rough, had items stolen, including my armed forces medals and needed help resolving my financial affairs".

Jaime, one of Ageless Thanet's three Life Planners, worked with Stephen to get him the benefits he was entitled to, resolve financial issues that were causing significant mental anguish, secure him a new home and obtain furniture from an armed forces charity.

WHAT DOES STEPHEN SAY?

"The one to one support I received from my Life Planner has given me peace of mind, given me a home, made me realise I'm not alone and there are people out there who can help. My life would not be the same without Ageless Thanet."

"I NOW HAVE THE CONFIDENCE TO BE MORE ACTIVE"



ALEC

Alec was at rock bottom when he initially came to our Life Planning Service. He ran a successful business for many years. A series of events beyond his control led to loss of money and his business having to close down. Multiple health problems worsened his situation. He no longer felt he had the position he once had in society. Alec moved to Thanet six years ago, but money issues continued to drain him and Alec's health continued to worsen. Having seen an advert for Ageless Thanet, Alec took action and contacted the Life Planning team who arranged to meet him.

WHAT DOES ALEC SAY?

"Ageless Thanet helped me to get the high rate of Attendance Allowance, £85.60 per week. This was backdated to the actual claim date so a lump sum covering 10-weeks was a very welcome surprise. I was given information on various clubs and social activities that I was able to attend through the support I received from my Life Planner."

NEW HOBBIES, NEW FRIENDS AND ENJOYING LIFE AGAIN

JUDITH



Judith was referred to Ageless Thanet by the Margate Task Force, she said "I didn't have any interests, I was leading a solitary life due to my disabilities."

Through Ageless Thanet's Life Planning service, Judith applied and received her blue badge parking permit, which she says "(it has)...made a huge difference to me, being reassured that when I go out I can park for free near to where I am going." The Life Planners also supported Judith's benefits appeal and gave her information about the many services available to support her. By building Judith's confidence, she was able to join a 10 week Ageless Thanet art course at which she has developed new skills, discovered her creative side and made new friends.

WHAT DOES JUDITH SAY?

"Ageless Thanet has helped me not to feel so depressed. I am definitely happier now, though I still have my health problems. It has broadened my world. I would not have had the knowledge of how to deal with things and feel more empowered. Ageless Thanet helped me move forward and enjoy life."

"THE LIFE PLANNERS HELPED ME WITH MY CONFIDENCE AND ABILITY TO SOCIALISE"



PAUL

Paul was referred to Ageless Thanet when he was feeling down all the time and found that he had difficulty in getting the support he needed. Paul was having financial difficulties and was living life on a very tight budget, finding it difficult to purchase essentials such as interview clothing. The Ageless Thanet Life Planner helped Paul by finding him free activities and ensuring that he was receiving everything that he was entitled to, relieving the pressure and giving Paul the financial freedom to live a fulfilling life.

WHAT DOES PAUL SAY?

"My Life Planner applied to Hospitality Action for a charitable grant, due to my long service in this industry they awarded me £30 per week for a year and gave me £200 to spend on an interview suit which made me feel much better in myself. I am now saving for a break to go and see Andre Rieu in Birmingham. This is the first time I will have been away in over 20 years."

We are delighted to have been given the opportunity to offer this service as part of the Ageless Thanet project. As one client described, accessing this service has been a “lifeline” for them and undoubtedly many others. We are proud to have delivered a project that has made such a huge difference to so many who were experiencing severe loneliness and social isolation.

Find out more...

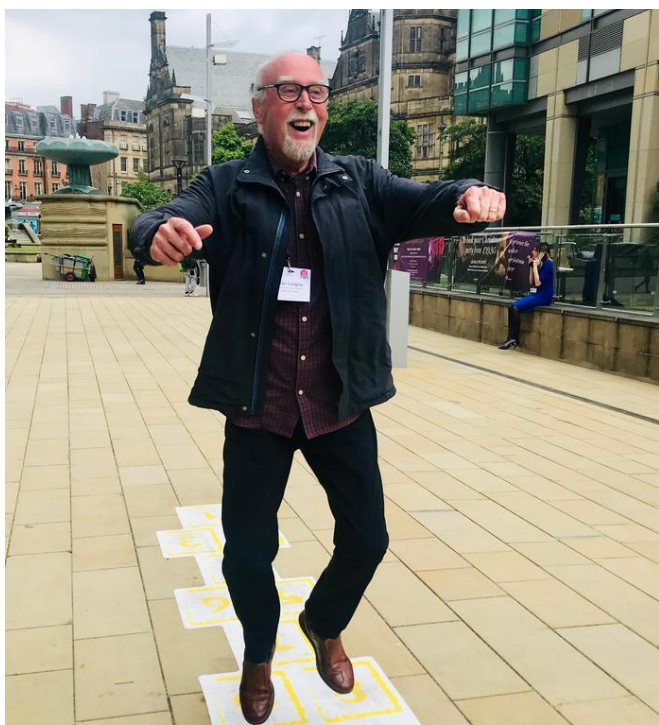


If you would like to find out more about the Ageless Thanet project, please get in touch -

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SEK Social Enterprise Kent

Social Enterprise Kent, the lead organisation of the Ageless Thanet project, is a Community Interest Company (CIC), registered with, and regulated by, the CIC Regulator. We have been in operation for over 30 years, with the overarching vision of “Improving Lives, Supporting Communities”.

Our key aims:

To provide support for people, particularly in areas of deprivation or for those most disadvantaged, to gain skills and employment

To support the creation, organisation and management of social enterprises and small enterprises; and to develop a way of making this sustainable

To support in the regeneration of deprived areas in Kent, by creating jobs and skills

If you would like to find out more about SEK, we would love to hear from you -

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