

EQUAL ROUND 2, ACTION 2

ACE NATIONAL

FINAL EVALUATION REPORT

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CONTENTS

EXECUTIVE SUMMARY	3
REVIEW BY OBJECTIVES	9
OBJECTIVE 1	11
OBJECTIVE 2	20
OBJECTIVE 3	34
OBJECTIVE 4	38
OBJECTIVE 5	55
OVERALL CONCLUSIONS	61

The evaluator would like to thank all the ACE NATIONAL DP partners for their contributions and courtesy in supporting the evaluation and most particularly to extend thanks and congratulations to the lead partner, Carers UK and notably the Project Director , Madeleine Starr for the quality of work provided for the evaluation of this DP.

Executive Summary

This evaluation report is the final evaluation task for Action 2 for the ACE2 DP Funded by the European Social Fund under the 2nd Round of the EQUAL programme in the UK. The report reviews the activities, outputs and outcomes of all five objectives of the DP.

The report considers the alignment of the work of the DP in relation to the EQUAL priorities of innovation, equal opportunities and empowerment. The final section of the report contains some overall conclusions.

The evaluator concludes that the DP has met fully the objectives and priorities of EQUAL and has shown itself to be a flagship model in delivering real impact which has the potential to continue for a long time to come.

The DP as a mechanism in helping to deliver the outcomes has proven to be of significant importance. It brought together researchers, operational (service delivery) public and private partners, a number of individuals and representative organisations with a determined focus and direct experience of carers lives and a lead organisation (and other partners with a strong policy building and lobbying role) with very sophisticated policy development and lobbying expertise.

The interaction and exchange across the DP was extremely high and the lead partner is to be commended for creating the processes and conditions for this to occur. It provides a model of 'research and practice' exchange in the domain of

socio-economic research that demonstrates significant value added delivered through the EQUAL investment.

A strong indication of sustainability is how the research outputs have been used by Carers UK in particular to push the policy discourse forward now underpinned by such strong empirical research.

It has also been used to directly support the work of Carers UK and the senior representatives from the local authorities in the partnership in their discussion with key service delivery systems players on whom they have been able to make an important impact.

At the end of the DP, the partners have been working towards and are awaiting the final recommendations on the new National Carers Strategy. They are to be commended for reaching this milestone which could not have been imagined at the start of the DP.

Introduction

This final evaluation report reviews the progress and achievement for Action 2 of the ACE NATIONAL DP¹ funded under EQUAL Round 2 in the UK.

Objective of the final evaluation report

This report is structured around a review of the work and achievement (between June 2006 and December 2007) of the objectives of Action 2 which are the basis of the work and aims of the DP. It also reviews the value added to ACE NATIONAL of the transnational partnership participation.

Most importantly, the alignment of the work of the DP partners in relation to the EQUAL priorities of innovation, equality and diversity and empowerment is considered. The final section of the report contains some overall conclusions.

The evaluation approach

This was a complex DP comprising different types of operational partners (local authorities, third sector organisations, and private firms), two research partners carrying out an important and innovative body of new and on going quantitative and qualitative research, and some highly significant policy development activity, led by a well established campaigning organisation, Carers UK, representing carers in the UK and bringing together campaigning organisations in Wales and Scotland. In addition, the impact on policy adoption during this period from both the earlier

¹ DP throughout this report refers to the ACE National Equal Development Partnership

work of ACE in EQUAL 1 and on going policy work of Carers UK has meant that the whole of the Action 2 period was marked by some significant policy change achievements.

There were some changes to the DPA, including a highly innovative addition to the research work; however, none of the DPA² changes impacted the original objectives negatively – in fact, any changes made were highly beneficial.

The evaluators adopted both a formative and summative approach to their role, and during Action 2 they worked with the DP in a formative way to support them as much as they could through what were on some occasions, challenging times. This was especially the case in the first year in relation to the operational partnership where some partners required some intensive support in understanding and focusing on outcomes and how they might be achieved.

In year 2, greater emphasis was on discussions with the lead partner about policy impact, tracking and reading research developments and outcomes as well as attending a number of DP discussions around sustainability and participating in a range of dissemination events.

This evaluation report is a summative review of what has been undertaken, the achievements of the DP and in particular the significance of the DP outcomes in relation to the key policy dimensions of EQUAL: Equal Opportunities,

² Development Partnership Agreement

Empowerment, and Innovation. The evaluators have based their judgments on the formal and informal documents of the DP as well as meetings and attendance at DP events.

Building a picture through the use of a scorecard

In the autumn of 2006, a 'scorecard' was developed alongside the interim evaluation report of the ACE National DP. The interim evaluation afforded the opportunity for an in depth review of the DP objectives, activities, anticipated outcomes, processes, cooperation and mode of operation and led the evaluators to conclude that it would assist the DP to develop a set of clear indicators of achievement for the final report and which will also guide the DP in the last 6-8 months of Action 2.

The aim of the scorecard was to document specific indicators (and ways to evidence these) that would assist the DP in demonstrating its achievements in terms of the EQUAL priorities, as well as its own objectives. The structure of the scorecard was built on five levels – value, impact, process and application, learning and satisfaction. Those familiar with the Phillips ROI Institute framework will recognise these. The scorecard was presented to and discussed with the DP steering group and the lead partner in late 2006. It was intended to provide the DP with a tool to monitor progress and to provide the DP with an opportunity to address any need for improvements on many of the most important indicators. A

questionnaire to gather data directly from partners was subsequently developed and presented to the operational partnership in early 2007.

Due to the fact that the scorecard was developed late in the lifecycle of the project, it proved too difficult to make use of it. This was a pity and the evaluators have since successfully introduced such a framework into other evaluations activities from the start. However, the feedback collected from operational partners using the scorecard questionnaire has been used by the evaluators to provide some input into the final evaluation report at the end of Action 2. The scorecard results are attached as Appendix 1. These results have been used to inform this report.

Review by Objectives

The objectives for ACE NATIONAL are as follows:

1. Delivery:

Carry out research into the factors that influence why, how and if carers access alternative care services that enable them to work, including identifying the impact of additional disadvantage such as gender, ethnicity and social deprivation.

2. Delivery

a. Use delivery partnerships/ demonstration sites to identify alternative care services provided by the public, private and not-for-profit sectors which would enable carers to remain in or enter employment, and to explore how services, including those using assistive technology, can be developed and enhanced to ensure they respond to the needs of working carers.

b. Deliver training to actors of change in local and health authorities on the new Carers (Equal Opportunities) Act to identify its implications for service delivery and to support its implementation.

3. Research, review and evaluate the involvement of carers in consultation about care service provision, at local and national level, in the context of the Widening Participation agenda.

4. Develop national partnerships in England, Scotland and Wales of carers, service commissioners and providers, regulatory bodies, policy makers, employers, unions and government departments that will use the learning from the delivery partners to influence long term development and investment in the social care sector.

5. Develop a transnational partnership to develop and test methods for the transfer of policy evidence and innovative solutions to the labour market disadvantage of carers between countries, in relation to the provision of alternative care services which enable them to work.

Objective 1

The objective was to ‘Carry out research into the factors that influence why, how and if carers access alternative care services that enable them to work, including identifying the impact of additional disadvantage such as gender, ethnicity and social deprivation.’

The work on this objective was principally carried out through the research work undertaken by the University of Leeds. The objectives³ of the University of Leeds contribution to the ACE National project were to:

1.1. Undertake statistical work, partly based on the 2001 Census, to further examine the characteristics of carers and to explore evidence of services provided and the population served in the selected localities
1.2. To survey carers in 10 localities about their use/experiences of services
1.3. To conduct follow up interviews with carers
1.4. To conduct interviews with approx. 40 personnel responsible for policy delivery and service developments relating to carers and services in the 10 localities (six in England and two each in Wales and Scotland)
1.5. To undertake a mapping of services to carers, provided by private, public and voluntary sector organisations in each of the selected localities
1.6. To undertake an on going literature review (academic and policy literature) to inform the research and reporting

³ The numbering used for the objectives relates to the numbering used in the ACE National Objectives 1-5. The work of the UL team is concerned specifically with Objective 1.

1.7. To manage the Research Project team efficiently and effectively

Activities

All the work below was a continuation of work that had been commenced in the first period (evaluated at the mid term).

1.1. Statistical work

- Completion of the detailed statistical analysis of Census 2001 data both for data mining purposes and for comparative analysis with CES data.
- Statistical data on local services was also analysed drawn from the NHS Information Service (England), Local Government Data Unit (Wales) and from the Scottish Executive.

1.2. Survey carers about their use/experiences of services

Research survey

- The Carers Employment Survey (CES) was conducted and completed across 10 localities covering a total of 1909 responses (original target 1320)

Survey analysis

- The CES data was analysed and the data tabulated/reported.

1.3. To conduct follow up interviews with carers

- In depth interviews with carers were conducted in the 10 selected localities: a total number of 134 interviews were conducted (original target 150)

1.4. Key informant interviews

- Interviews of Key Informants were conducted in the 10 localities with

<p>personnel responsible for policy delivery/service development relating to carers and services.</p>
<p>1.5. Service Mapping</p> <ul style="list-style-type: none">○ Prior to the key informant interviews, a website search was conducted as part of service mapping exercise (structured template) which gathered data on past approaches, strategies and structures relating to services affecting carers plus new/current developments. This data was then validated at the interviews.
<p>1.6. Literature review (academic and policy literature) on going</p> <ul style="list-style-type: none">○ Staff at UL maintained a literature review throughout the DP lifecycle
<p>1.7. Management of Research Team</p> <ul style="list-style-type: none">○ The management of the research team was carried out by Prof S Yeandle and all activities were carried out as planned. There was a small, well justified (and agreed) extension to the research period.
<p>1.8. Reporting</p> <ul style="list-style-type: none">○ A series of research reports were prepared and published.

Outcomes

The research objectives have been comprehensively achieved and delivered a large body of research based evidence to support the DP's policy direction and practice recommendations relating to carers and work. The individual reports are listed below under 'Published Outputs'. Of particular importance for EQUAL (and specifically for EU and National policy makers wishing to draw lessons from EQUAL DPs) is the publication, 'Carers, Employment and Services: time for a new

social contract?’ As is noted below under Objective 5 (Transnational activities), the outcomes have important potential value not only in maintaining and continuing to shape the debate in the UK but this report in particular has the potential to ‘light the touch paper’ for an informed discourse at the European level in the context of employment and social policy and to guide future research at European and Member State level.

The impact potential of the research in the UK is significant and has already helped to inform a number of policy activities of the lead partner, Carers UK, as well as the practices of other key partners such as the three participating local authorities. In particular, it has been of great importance in shaping the planning and consultation approach of the proposed new National Carers Strategy (currently in preparation) as well as shaping the likely strategy recommendations from the Department of Health to government.

The research report data has been widely disseminated and this is likely to continue for some time to come. It should also be noted that as was evident from the first ACE EQUAL DP outcomes, the impact of the research is likely also to have a ‘long tail’ into the coming years.

In addition to the importance of the research in shaping current and future policy initiatives, the findings are of particular concern to those in the UK responsible for the delivery of social services and the assessment of those services in meeting policy (and broader social and economic) objectives: the number one finding being

that only a quarter of working carers say they have services sufficiently adequate to enable them to work. Of particular interest for those responsible for service delivery are the reports specific to the localities where research was conducted: these localities are now in receipt of data disaggregated to their level. It would be hoped that other localities might look for similar research disaggregation and data collection to be conducted in their area of responsibility in order to be able to establish a stronger basis for their service planning.

For the University of Leeds, sustainability is guaranteed through a number of planned trajectories. In the first instance, there remains a significant amount of data collected in the CES survey which will continue to be mined. Secondly, there is the potential to build on the local reports across the UK both by deepening relationships within those localities(and specifically relationships with the local Authorities) already covered in the CES and by offering a similar opportunity to other localities for similar data and use of research to underpin their planning and decision making.

Thirdly, there are opportunities to extend the research work, notably towards an examination of behaviours and decisions of carers at various times in their lives in relation to their participation in and adaptation to circumstances which influence their participation in the labour market and their potential for participation in the future. There is also scope to examine carers' identities in relation to the labour market and to how those identifies are formed by individual carers (and thus influence their labour market participation) but also how carers' identities are

perceived by those delivering health and social services as well as other socio-economic actors (also influencing labour market participation).

Fourthly, at an international and in particular EU level, there are clear lines of research that the team wish to pursue using the sound data already gathered and/or analysed in ACE to explore demographics, in particular in relation to migrant activity and the impact on those left behind as well as the role of migrants in care work. This area of research offers an exciting field for EU level research where the EU dimension offers the potential for real additionality from the research.

The research should also support scenario building and/or forecasting for socio-economic policy bodies and public agencies modeling future socio-economic policy impact changes. It should be of interest to a range of national and international agencies such as ESRI, Department of Work and Pensions, Treasury, OECD, ILO, UN, European Commission, DG Employment and Social Affairs, DG Research etc. Representatives of some of these organisations have attended events already where they have been presented with the research results – see below Objective 5, Transnational activities.

At a more pragmatic level, as a result of the success of the research in ACE and the academic and policy profile it has achieved, sustainability has been assured by the commitment of the University to support the research team that worked on ACE. In particular, the team is being positioned within a push to deliver and demonstrate

real impact from knowledge transfer both within the University across disciplines but also in terms of external knowledge transfer demonstrating higher application and impact of research on the social and economic spheres in the UK.

Published outputs (in the public domain)

CES 1

Stages and Transitions in the Experience of Caring

CES 2

Managing Caring and Employment

CES 3

Diversity in Caring: Towards Equality for Carers

CES 4

Carers, Employment and Services in their Local Context

CES 5

Action for Carers and Employment: Impact of the ACE partnership 2002-7

CES 6

Carers, Employment and Services: time for a new social contract?

CES 7

Carers, Employment and Services in Scotland

CES 8

Carers, Employment and Services in Wales

CES 9

Carers, Employment and Services in Hertfordshire

CES 10

Carers, Employment and Services in Leeds

CES 11

Carers, Employment and Services in Sandwell

CES 12

Carers, Employment and Services in Sheffield

CES 13

Carers, Employment and Services in Southwark

CES 14

Carers, Employment and Services in West Sussex

Conclusions

- This research work has provided an excellent example of real distance travelled in terms of state of the art and has been of very high value added
- The quality of the research activities undertaken by the ACE partner team at the University of Leeds was very high and is to be commended
- The research planning was thorough and allowed for contingencies
- The research methodology was sound and highly appropriate to the research objectives and the DPs other objectives (policy and practice impact)
- The quality of the research instruments, protocols and approach was all extremely high
- The responses to the CES questionnaire exceeded expectations and, most notably for further/future research, a huge proportion (79%) agreed to be available for further contact

- The scale of the research results (notably from the CES) exceeded expectations
- The published reports are of very high quality, informative and were of significant importance in supporting the policy and operational work of the DP: their value is likely to be realized to a large extent well into the future
- Dissemination of the research reports was extensive both through physical and virtual distribution and through papers at conferences and presentations at ACE and DP partner events
- The nature of this research work, as demonstrated by the way in which research work undertaken in ACE EQUAL Round 1 was able to add significant value in ACE National Round 2, points to a very high level of sustainable impact

Objective 2

This objective was in two parts.

- Use delivery partnerships/ demonstration sites to identify alternative care services provided by the public, private and not-for-profit sectors which would enable carers to remain in or enter employment, and to explore how services, including those using assistive technology, can be developed and enhanced to ensure they respond to the needs of working carers.
- Deliver training to actors of change in local and health authorities on the new Carers (Equal Opportunities) Act to identify its implications for service delivery and to support its implementation.

There were a very large number of activities in relation to this objective which are detailed fully in the interim progress reports. In addition, the scorecard questionnaire results (see Appendix 1) provide extensive examples of activities, outputs and outcomes relating to these activities.

This report therefore only identifies some highlights.

ACE has produced materials for employers and practitioners to support implementation of new legislation, including an Employers Pack to support implementation of the Work and Families Act, which was rolled out through a national promotion in partnership with the (then) Department for Trade and Industry, ACAS and the British Chambers of Commerce.

Herts CC assisted 273 carers to overcome the problems they were facing in achieving their aspirations to maintain or start learning and/or work whilst continuing to care. They assisted social workers / occupational therapists to upgrade their practice to meet the new duties of the carers Equal Opportunities Act 2004 on a case by case basis to ensure good outcomes for carers maintaining or starting in the labour market. A Guide was produced for the Exit Conference which is available as a tool for open use.

Contact a Family in Lewisham worked with over 250 carers over the course of Action 2 providing advice and information, gathering feedback to support most particularly the organisation's policy work and hosting events relevant to the needs of their local parent carers.

The business case of the benefits of a carers' policy and good practices was presented to employers in Hertfordshire (University of Herts, John Lewis WGC, West Herts PCT) and a carer employee/ manager agreement document has been shared and adopted in several other local authorities. This document for carers who work at HCC has been formally adopted. HCC has 32,000 employees with at least 18% of workforce being carers. 'The carer employee agreement ensures continuity of flexible working agreements regardless of manager until the next annual appraisal. Should changes need to be made at that appraisal, on the basis of service needs, the manager is required to discuss with HR prior to reaching a decision which might adversely affect the carer's working pattern and ability to combine care and work.'

Carers Wales conducted a range of activities in this second half of Action 2, including a carers workers' network meeting on the new Carers Strategy and Carers Manifesto, network meetings for carer members of Local Health Boards in North and SE Wales and training sessions with local authority staff on the Carers (Equal Opportunities) Act. They undertook extensive awareness raising and lobbying and provided inputs into a number of events and conferences.

In Surrey, guidelines on Carers & Eligibility criteria were developed together with training in Carer Awareness: There was an increased uptake in training by the Surrey & Borders Mental Health Trust and overall there was wider participation in the whole day training course. A shorter half-day course was developed and delivered as well as training to the new (Surrey CC) Contact Centre staff and information sheets on Carer issues, Information on Carers Rights and the Work & Families Act were produced for this group.

In particular across West Sussex, there was raised awareness and widening understanding of Direct Payments (DPs) and how these assist carers employment needs/wishes. A DP support service QAF tool was developed to be used as a quality assurance check for internal appraisal of good practice standards of support.

In West Sussex, there is now a section on the DP's annual review form asking whether carers have had an assessment or are aware that they are entitled to one. It also advises that they can have assistance from the ILA advocacy team or their local carer's services to complete it. This is also flagged up to the social worker if

they are not present at the review. The ILA now has named people who pass on information about carers services to the rest of the team through team meetings and supervision.

The RISE team also developed local models of self-directed support, including working with the Individual Budget Pilot. The Chichester DP Network is currently running as a pilot... 'After completion of the pilot, the network will be introduced as a routine way for DP clients to arrange care and staff will be trained accordingly with an appropriate advice document produced to cover this.' Following the pilot (beyond life of ACE) other networks may follow.

Alternative supports for the recruitment and retention of good quality Personal Assistants (PAs) were developed; a PA register (database) was created with adherence to CSCI regulations; informal PA networks and a PA cooperative were established and a process to ensure faster CRB checks put in place.

Advocacy was delivered through each of the three local authority partner areas with advocates working in partnership with the social workers and care managers in order to access the services available. Contact a Family in Lewisham also provided advocacy and supported parents and carers of children with disabilities in finding solutions to very specific care needs.

Carers UK developed its training and consultancy activities to include employers, and is working beyond ACE with Employers for Carers to extend the group into an employers' platform modelled on the Employers Forum on Disability.

New partnerships were established with Health, Social Work Services and Voluntary Organisations in Scotland. One example was a pilot project in East Ayrshire to develop a person centred approach to carers' assessments. The aim was to improve the uptake to ensure better outcomes for carers. 'Over time it is hoped that the model will be adopted by other authorities and with the support of professional organisations and the Scottish executive rolled out across Scotland.'

The Contact a Family team at Lewisham produced a 'Contact a Family Directory' of services for families with a disabled family member.

Crossroads, through the pilots run by its schemes involved in the DP provided a range of services to carers throughout the life of the project. These covered families in urban and rural areas. In order to generate enquiries for services, each pilot carried out a wide number of awareness raising activities to offer services to carers. These included mailshots, flyers, newsletters, articles, leaflets, and presentations to key stakeholders (individuals and groups). One pilot undertook a survey into how the current service as a whole could be improved to support working carers and produced findings for use across Crossroads. These and other data were part of the contribution made by all Crossroads pilots into a workshop for the national membership at the national conference and AGM in Coventry in November 2006 to

raise the level of understanding and support for the client group amongst the membership. The ACE project was one of two national events singled out for comment by the Chief Executive during her speech to the conference floor.

In early 2007, an ACE special edition of Crossroads newsletter was circulated to the entire network and national and local stakeholders. It was picked up by Radio 4 and built into the Carers Week coverage on Woman's Hour. ACE workshops were held at the Wales Seminar in March 2007.

The training tool: "Working for Carers" DVD; Guide for care managers; carers pre-work guidance and a training pack to accompany the Guide and the DVD together with A4 quick reference sheet for care managers to take with them when carrying out carers assessments was developed at HCC.

All documents in HCC Adult Care Services now need to make a clear distinction between carer and careworker. In addition, the IRIS Computer client database now has an extra field requiring care managers to complete if the carer is in employment. Also in Herts, the local authority's transport policy now includes carers in both its 'policy statement and in its guidance – with particular reference to working carers who need punctual transport for those they care for – in order to be able to get to work on time.'

Action for Carers Surrey developed podcasts via ACE Radio and produced a Work & Families Act Information sheet.

Nestor developed and disseminated case studies following their examination of how Nestor's services could be developed and enhanced to ensure sustainable support for working carers. Identification of primary carers in a situation where care services are being delivered has now been included in initial assessment documentation, and all documents need to make a clear distinction between carer and careworker. Carer awareness is being embedded in induction training across the organisation following a pilot in Nestor's home care services in Welwyn.

One aspect of this objective was to explore how services, 'including those using assistive technology, can be developed and enhanced to ensure they respond to the needs of working carers.' To this end, ACE was a partner in the TATE EQUAL project, which explored ways in which innovations in telecare could be used to support the independence of adults with learning disability, and increase the ability of their parents to access work. ACE supported TATE's dissemination activities, and the ACE/Carers UK New Horizons conference in September 2007 was used as an opportunity to showcase TATE's achievements to an audience of policy makers and practitioners.

Tunstall, one of the UK's leading telecare providers, was a partner in TATE and through contacts made with Carers UK through TATE, and previously in other areas of work exploring telecare solutions for carers, subsequently established a partnership with Carers UK to take forward the carers and telecare agenda. This has so far involved sponsorship of events and input to the New Horizons event, and the production of a booklet on telecare solutions for carers. Tunstall has promoted the

case for using telecare solutions to support carers' ability to work, producing a number of case studies which it has used at national events, including the first DTI conference held to launch the international Continua Alliance, which aims to promote telehealth and telecare solutions internationally and to explore the co-production of technology. Carers UK has subsequently been approached by Tunstall to become part of a project working within the Alliance.

ACE partner Nestor also worked on telehealth and telecare solutions, and presented its work in the context of support for carers to access a life outside caring at the New Horizons conference. They are involved in a consortium seeking to do research on telehealth and telecare in Europe.

ACE local authority partners worked with their own telecare pilots to establish whether their work was exploring the impact of telecare on carers, in particular their ability to access a life outside caring. All three partners were successful in having impact on carers included in the evaluation of their telecare pilots, and subsequently promoted the potential benefits to carers of telecare through the national local authority network.

Outcomes

In addition to some of the changes relating to on the ground practice noted above, the most important outcomes for the operational partnership was in the knowledge and skills gained within the partner organisations. Issues relating to policy

changes where Local Authority partners were directly involved are dealt with under the section on Objective 4 below.

What did the partners learn?

A significant outcome for the operational partners was the very great amount of learning for all those involved in delivery. Again, detailed comments on these are provided in the scorecard results (Appendix 1) so again only a few highlighted extracts are included here.

‘The experiences and key messages from ACE delivery partners have enhanced Carers UK’s knowledge base on what works for carers at local level, and fed into the development of information and training resources for carers, professionals working with carers and employers.’

‘As the result of the Herts ACE project, there is a greater knowledge of carers rights in relation to employment e.g. duties under section 1,2and 3 of the Carers (Equal Opportunities Act) 2004 and more recently Work and Families Act, through formal training, informal discussions, high profile of the project and the Exit Conference – plus training tools. Knowledge has also been gained by care managers about how to advise and empower carers to overcome the barriers preventing the work/study goals they have identified during carers assessment.’

‘The use of Continuing Professional Development forms to capture learning in relation to practice has proved useful in gaining evidence of the impact of the

project and also as a way of reinforcing learning for the organisation staff. As part of the multi agency strategy and Beacon Award influence many partnerships have developed. The learning and development of joined up planning and projects has and continues to increase knowledge and better outcomes for carers e.g.

partnership working between: 10 newly nominated District Council Carers Champions; Specific Carers and Learning and Work multi agency group (Job Centre Plus, HCC Work Solutions, Learning Skills Council, Careers Service, etc.)

Knowledge has been gained about the potential for brokerage models together with models of informal networks and PA cooperatives. The Care Alternatives project researched alternative ways in which care may be delivered using DPs. Partners gained understanding of the background history and development of individualised funding systems and the place for support brokerage with all the elements needed and its relation to systems of DP support. Important knowledge was also gained about the Benefits disincentives for carers wanting to work part time. These have been passed to DWP.

At a more general level, partners have learned about ESF funding, financial management, and partnership development and management. There has also been significant learning about mainstreaming the concerns of particular groups into the wider social development agenda. Working in complex partnerships with differing agendas and multi agency working was a critical learning experience for several partners not just those directly concerned with policy.

Some partners have learned significantly from lobbying on behalf of carers and carers' issues. 'Learning the appropriate place to raise the profile of carers in new developments in social care and keeping the subject live and as equally focused for them as for the service users' (RISE). Other learning includes 'Finding an acceptable and recognised way of constructing a framework tool. Being able to tap into professional skills and knowledge and experience available within own organisation and the commitment and goodwill of colleagues to 'make things happen' and take ownership of different events' (RISE).

Partners have also learned about working with journalists and the media. ACE Radio, started by the ACE Surrey team in the first EQUAL round ACE DP, continued through ACE2 interviewing and broadcasting/podcasting carers, partners, and other key stakeholders.

The ACE initiative has generated interest from all sectors of the media, national and local, particularly radio and television resulting in a number of interviews on both. Some have learned to manage their own capacity better and developed skills in facilitating, negotiating, motivating, managing change and learning new tools e.g. survey monkey (ACE, Surrey).

For the non statutory bodies involved, learning included 'an increase in knowledge about employers insurance, public liability insurance and other related types of insurance and skill regarding providing advice to people about these things. Increased knowledge about the rules and legislation surrounding

registration and inspection activities of the Commission for Social Care Inspectorate (CSCI), and skill in how these apply to care models.’

Operational partners, particularly the local authority partners learned from the telecare/telehealth work that was undertaken and it brought the work in this field into the discourse about ways in which carers can be assisted in remaining in active employment.

Outputs

The partners produced a large range of leaflets, flyers, guides, training materials, reports, articles, podcasts and radio programmes, presentation packs both for their own use and for sharing across the DP. These are all detailed in the quarterly reports.

Conclusions

This objective primarily provided the opportunity for a wide range of operational partners to experiment with and innovate new approaches and practices relating to ‘alternative care services provided by the public, private and not-for-profit sectors which would enable carers to remain in or enter employment, and to explore how services, including those using assistive technology, can be developed and enhanced to ensure they respond to the needs of working carers.’

The work was very strongly focused on activity rather than delivering to any specific outcomes ; in a sense, outcomes were aspirational given that these

alternative service explorations were largely experimental, conducted by a very wide range of service stakeholders with different types and levels of expertise and activities were not constructed around robust methodologies with measureable targets for achievement. Judgement on outcomes therefore is confined only to whether real effort was made to 1. engage with carers to the greatest extent possible, 2. whether there were attempts across the operational partners to provide innovative alternative services (innovative here defined as something different to what the providers were normally offering and/or stretching the boundaries of their usual practices); and 3. whether there were any useful findings that were recorded and which might point the way for future research or attention in policy and practice.

With regard to 1. the ICPRs and reports at partner meetings describe extensive engagement with carers in planning, shaping and delivering alternative service offerings. There is clear evidence of engagement with carers as recipients of these alternative services and engagement with carers in broader ACE national activities such as consultation exercises for the National Strategy review and for Equal partner events.

In relation to 2. researching, designing and executing alternative ‘innovative’ services, there is clear evidence from the ICPRs and also reports and other documents produced by the partners (some described in some detail in the Scorecard report), that many did indeed stretch the boundaries of their existing services (e.g Crossroads, ACE Surrey, Contact a Family and Nestor), some

researched and built new proposed models for services (e.g at RISE), and others made real changes to 'systems' where they were in a position to directly influence those changes (eg. At HCC).

As for item 3 above, useful findings were recorded and made available across the DP and more widely serving policy and practice, in particular the work on Direct Payments, PA Cooperatives and Brokerage and providing some direction for future research.

Most importantly, the operational partners provided one of the most important sources of direct experience and user/beneficiary engagement for those working in the research activities and policy direction: there was an excellent working relationship between these partners and this has been one of the most important factors in delivering the DP's research and policy outcomes.

Objective 3

This objective was to ‘Research, review and evaluate the involvement of carers in consultation about care service provision, at local and national level, in the context of the Widening Participation agenda.’

Activities

As detailed under the section above relating to Objective 1, it is noted that extensive interviews were conducted with carers as part of the CES research led by Leeds University.

The majority of operational partners also undertook consultation activities within their local areas and/or communities/stakeholders. Some of these are highlighted in the above activities description under Objective 2. A few specifics only are detailed here. Important consultations took place on the part of Contact a Family (already described in the interim report) both locally within Lewisham and more widely by the Contact a Family ACE policy officer.

In Wales, Carers Wales undertook a survey and consultation events with carers on their priorities for the Carers Manifesto 2007. 364 survey forms were returned and approximately 200 carers attended consultation events. The Carers Wales team were also involved in an advisory panel for University of Bangor Research project on carers and Mental Health.

At the heart of the activities relating to this objective is the work of Bridge Research and Development which carried out extensive consultation with carers for their work in building their Interactive Policy Tool, 'Care to Take a look'. Some of this was already reported in the interim evaluation report.

This tool has been available since Spring 2007, was shown at a 'blue skies' event in Brussels in March 2007 and at the ACE transnational conference in June 2007 and has been widely disseminated since. It is available on the Carers UK website. The tool which is highly interactive and accessible, looks at the difference that caring makes to individuals and families and highlights the contribution that carers make to national life. It is the product of interviews with carers and of discussion and exploration with Carers UK and the ACE project team and its European partners. It incorporates statistics provided by the University of Leeds.

The main purpose is to show the differences that policy makers, service providers and individual practitioners can make if they have an understanding of and perspectives from carers and take this into account in their decision making. It shows that people may be drawn into caring at any stage in their lives and that the effects on education, employment, income and health, whilst variable, may be damaging.

Equal Partners was also a central partnership activity directly addressing this objective. It had achieved by the end of Action 2 a membership of nearly 2000 carer activists and supporters and worked with these carers to help them participate in Carers Strategy groups, lobby local politicians and media and provide consultation input. Workshops were held across the UK to gather input into the new National

Carers Strategy and a report; 'Carers Voices' has been published by lead partner Carers UK. Training is also provided to carers by Equal Partners' members to assist them in gaining confidence in presenting information, identifying the right people to contact and making the case for change.

Outputs

- Interactive Policy Tool, 'Care to Take a Look'.
- Equal Partners newsletters
- Equal Partners Campaigning Pack
- Training and information materials
- Carers Voices Report

All the above are available through the ACE/Carers UK web pages.

Conclusions

The objective here to 'Research, review and evaluate the involvement of carers in consultation about care service provision, at local and national level, in the context of the Widening Participation agenda' has been achieved to a very high extent. The work of Equal Partners has delivered very large numbers of 'engaged' carers in consultation as well as raising their voices significantly at local level.

Direct access to carers through the work of Equal Partners combined with the work of the operational partners (awareness raising and increased visibility through new/extended service provision), the dissemination of the CES questionnaire and

high profile campaigns led by Carers UK and reinforced through Carers Rights days and Carers Weeks appears to have grown the numbers of carers now identified within the carers' community. An early concern was how to identify 'invisible' carers as well as give carers a greater voice. During the life of the DP, many 'invisible' carers have been identified, and together with more visible carers were able to give their views and helped to shape the policy agenda. Their experiences with practices (especially the provision of care services to enable them to join, remain and return to the labour market) or their inability to make use of relevant services (through lack of awareness or inaccessibility) have contributed to the politicisation of the carers' agenda, most particularly in relation to employment issues.

Objective 4

The objective here was to ‘Develop national partnerships in England, Scotland and Wales of carers, service commissioners and providers, regulatory bodies, policy makers, employers, unions and government departments that will use the learning from the delivery partners to influence long term development and investment in the social care sector.’

Activities

A large amount of activity occurred in relation to this objective led by the lead partner, Carers UK but also involving Carers Wales, Carers Scotland, and the ACE Policy Officer at Contact a Family. Other partners played an important role in this policy work as well, notably the senior representatives of the three local authorities, the research partners University of Leeds and Bridge R&D and further research to support the work of this objective was also commissioned from the Institute for Public Policy Research (ippr). The details of all these activities are captured in the ICPRs as well as reported in newsletters, bulletins and other reports. The selection below therefore only includes a small selection of some of the key activities.

Carers UK appointed a new policy officer in the second half of Action 2. Working with Carers UK’s own policy and senior management team, the policy officer and project director led on all policy work and undertook a large number of activities throughout the whole period.

The New Deal for Carers' (which was one of the most significant outcomes of ACE1 and the continuing work of ACE National) proposed in the Government White Paper, 'Our Health, Our Care, Our Say', and which included the review of the National Carers Strategy, was formally launched in February 2007 by Gordon Brown. The announcement of the review was followed by extensive discussions, meetings, presentations etc made to senior policy makers at the Department of Health and the chair of the group to review the National Carers' Strategy. Meetings were also held with MPs and Ministers.

Media coverage included a visit by Gordon Brown and Ivan Lewis, Minister for Care, to the home of carer Jill Pay, identified and supported as a case study by the ACE Equal Partners project. ACE participated in the two ministerial consultation events held following the launch.

Carers UK was invited to sit on the National Steering Group for the review of the National Carers Strategy and has been directly participating as a member of four task forces: income, employment, equal opportunities and health and social care. ACE is represented on the employment task force and the results from the Leeds research in particular have been fed directly into all task forces.

In addition, ACE input through Carers UK to the review was supported through consultation events, through Equal Partners and the Black Carers Workers Network (Afiya Trust) and a consultation Q&A session with local and health authority

participants in the ACE Carers Week Conference. . In October 2007, a report entitled Carers Voices: Shaping the 2008 National Carers Strategy was produced and disseminated.

Stakeholder discussions and events were organized with SCIE, CSCI, Skills for Care, ADASS, EOC, Contact a Family, Help the Hospices, Home Farm Trust, TATE and Afiya Trust. Carers UK helped plan and participated in the ACE Local Authorities consultation event on implementation of the New Deal for Carers proposed in the Government White Paper, 'Our Health, Our Care, Our Say' in February 2007.

In addition, ACE contributed to the Carers UK briefing and response to the CSCI consultation document 'A New Outcomes Performance Assessment Framework for Adult Social Care'. There was a joint ACE/CSCI workshop on the proposed Performance Assessment Framework for services to carers which was followed by the establishment of a small working group to produce a set of performance indicators for the CSCI Performance Assessment Framework, led by ACE partners Surrey and Herts County Councils, to inform the review of the National Carers Strategy.

There were detailed contributions to inclusion of carers in policy discussion around pension provisions linked to the passage of the Pensions Bill/Act in 2007.

There was an important input into the Work and Families Act where ACE contributed through Carers UK and the Parents and Carers Coalition to the

achievement of a final definition of a carer in the regulations to the Work and Families Act, that ensures that as many carers as possible benefit from the new right to request flexible working.

There was an ACE presentation at ‘The Right to Request Flexible Working – a Review of the Evidence’, a DTI event with Jim Fitzpatrick, Minister for Work Life Balance, to launch the review report and the Work and Families Act 2006 which raised awareness and recognition of the benefits to carers of flexible working, and the potential impact of the Work and Families Act on employment culture.

The ACE Employers Resource Pack, produced in partnership with the DTI, was launched at a parliamentary reception in the House of Commons held to mark the coming into force of the Work and Families Act 2006. The pack received significant media coverage, including BBC News 24 and was distributed to HR professionals, employers and key policymakers, and also through the British Chambers of Commerce.

ACE contributed to the Carers UK campaign on carer poverty, including contributing to the design of a research questionnaire, the Carers UK care and poverty campaign – ‘Real Change not Short Change’ (calls for a review of carers’ benefits) and the final report.

Receptions, fringe meetings, a promotional stand and other awareness raising and lobbying activities were conducted at the autumn rounds of party conferences in both 2006 and 2007.

Highly visible and reported Carers Rights Days and Carers Week events were planned and held in 2006 and 2007. During June 2007 Carers Week, events included a newsletter and conference 'Caring – My Life and Yours.' At this same event, the Life Course Tool – 'Care to Take a Look' produced by ACE partner Bridge Research and Development was launched (it had been shown in an earlier version at a 'Blue Skies' event held in Brussels).

ACE sponsored the Charity Champion Awards given to a parliamentarian who has demonstrated exemplary commitment to a charitable cause. ACE used the sponsorship to place advertorial copy in the House Magazine on carers and the disadvantages they face, including in terms of labour market participation. There was a direct link from the Charity Champions website to the ACE website, with prominent banner advertising for ACE, acknowledgment of ACE at the parliamentary reception to announce the short listed candidates and the awards event, ACE inserts in packs at the awards event, and an ACE stand and promotional materials.

ACE produced a briefing on Equalities which is available on the websites. www.CarersUK.org and www.acecarers.org.uk . ACE also responded to the recently Discrimination Law review.

ACE was represented at a range of national events to network and promote issues around carers and work:

- All Party Parliamentary Group on Carers
- Public and Commercial Services Roundtable on the Freud Report
- Care Matters – Elizabeth Nuffield Foundation launch of report on implementing the Carers (Equal Opportunities) Act
- Smith Institute Lecture on Equalities
- CSCI London Regional Conference on Carers
- EQUAL Thematic Networking Group events
- Great Expectations – conference on carers assessments
- DTI Global Telehealth Symposium
- Launch of the European Year of Equal Opportunities for All
- Launch of ‘Cash for Care’
- ‘Cash in Hand’, the Carers UK/ACE conference on Direct Payments and Self Directed Care in May 07, with participation from ACE policy and delivery partners.
- Internal (Carers UK) policy workshop held to identify key ACE policy activities and outcomes.
- Conference organized by the Beacon Local Authorities
- Carers UK/ACE conference – New Horizons - on telecare and assistive technology in London
- Breakfast event to discuss preliminary findings of IPPR research

- Windsor Age of Connectivity Dialogues – Citizenship and Care in Cities and Settlements of the Future – roundtable event
- Carers and Work: A New Deal, ACE carers workers conference, Kings Fund, London, November 2007
- Carers, Employment and Services Report Series: locality reports, dissemination events in Hertfordshire, West Sussex, Anglesey, Swansea, Leeds, autumn 2007
- National Strategy for Carers: what do employers want? Employers for Carers business breakfast to launch Carers, Employment and Services: time for a new social contract? Report 6 in the CES Report Series, Royal Society of Arts, London, November 2007
- ACE National Celebration Event to launch Action for Carers and Employment: Impact of the ACE partnership 2002-2007, Report 5 in the CES Report Series, the Atrium, Millbank, London, December 2007

Monthly bulletins were produced for the whole partnership, circulated by e-mail.

In **Scotland**, work continued and was completed on a National Framework for Carers and Employment. ‘In May 2007, Carers Scotland produced a Framework Document to raise awareness with both employers and service providers of the issues around work and care. The framework informed and developed by consultation and discussion with employers and service providers across Scotland sets out the Economic, Business and Moral case for organisations to embrace the political imperative of introducing flexible working practices. It also sets out, and

provides links to examples of good practice, the arguments for the need for social care providers to provide a range of more flexible services. It was produced to coincide with the implementation of the Work and Families Act which introduces a right for carers to request flexible working. The document provides a resource that will help employers implement the new legislation and to promote the development of alternative care solutions, which will enable carers to remain in or return to, paid employment.' It was launched at a conference in May 2007 for employers where the employment research produced by ACE to support the implementation of the new Work and Families Act and a DVD case study of a working carer were also presented.

Partnerships in Scotland were established with Health, Social Work Services and Voluntary Organisations. One example was the pilot project in East Ayrshire which is described in the scorecard report. 'Over time it is hoped that the model will be adopted by other authorities and with the support of professional organisations and that the Scottish executive will agree to its being rolled out across Scotland as part of its 'Changing Lives' agenda'

Carers Scotland undertook extensive lobbying on behalf of carers and carers' issues by establishing contact with 'individual MSPs, organising events in the Scottish parliament, being instrumental in having motions tabled and debated in the house, bringing carers into direct contact with MSPs to state their case and encouraging and supporting the establishment of a cross party group on carers within the Scottish Parliament.' A manifesto for Carers in Scotland was developed in the lead

up to elections for the Scottish Parliament, and launched on Carers Rights Day; an event attended by the Health spokesperson of all of the main political parties. This was widely disseminated (40,000 manifestos were distributed by carers organisations together with 60,000 post cards). A motion was lodged at the Scottish Parliament in support of Carers Rights Day and 38 MSP were signatories.

Finally, an ACE research symposium, 'Carers, Employment and Services' was hosted by Carers Scotland in October 2007 at which the detailed results relating to Scotland from the CES research was presented.

In **Wales**, similar policy work was also extensively carried out by Carers Wales. A Wales National Policy Partnership was established in the first half of Action 2 and work continued in the second half with politicians, Public Affairs Cymru and Cardiff Law School to prepare for possible legislation in Wales on carers and carers issues after the implementation of the Government of Wales Act (April 2007).

Briefing and lobbying work was directed at the four main political parties towards inclusion of carers' issues in their manifestos for May 2007 elections; one outcome of this was that the Welsh Liberal Democrats included a pledge to introduce a Measure for carers in their election manifesto. A meeting took place with Dafydd Elis-homas (Presiding Officer of the Assembly) to discuss issues around introduction of an Assembly Measure for carers.

A series of events and activities with key stakeholders as part of the consultation on the draft “Re-focusing of the Carers Strategy for Wales” took place including four regional seminars with delegates that included strategic staff from social services (both adult and children’s services) and local health boards; carers’ champions from several local authorities (elected members); LHB carer members and staff and carers from the main local carer organisation in each area. These events were supported by the Welsh Assembly Government and Carers Wales worked in collaboration with Crossroads Wales and Learning Disability Wales.

Carers Wales collated the consultation responses and submitted this report to WAG. They also had separate consultation sessions with carers which informed their own consultation response. A report was submitted on the Carers Strategy consultation events held in Jan 07 and further comments made directly to the Minister at Carers Strategy Review panel Meeting in April 2007. One result was a re-focussed Strategy and an additional £1 million pounds committed for emergency care.

A Carers Manifesto was developed for the elections in May 2007 which was a Wales Carers Alliance publication to increase its effectiveness. Also in preparation for the elections, three party conference fringe meetings were held to campaign for improved services. Improved care services were one of the three key demands and 5000 copies were distributed to carers and the election candidates of all four main parties.

Carers Wales also submitted a response to the “futures” consultation on social services in Wales: “Fulfilled Lives, Supportive Communities”. Other activities included attendance with an information stand at the Welsh NHS Confederation Conference - on local service boards.

A final ACE ‘Achieving Change for Carers’ conference was hosted by Carers Wales in October 2007.

Contact a Family, through the work of their policy officer maintained an active schedule of lobbying, consultation and report submission/publication. Meetings took place with the Treasury, DWP, DfES and other departments on a variety of topics linked to families and care for those with disabilities. Meetings with Children’s Information Services across England were also held to establish how CISs can help parents with disabled children find and pay for childcare (including details on brokerage, links with sufficiency duty - key agent for recording unmet demand), assistance from tax credits, social services etc

A number of events took place among which was the significant November 2006 conference co-hosted by Contact a Family and Carers UK ‘A New Deal for Parent Carers?’ in London for local authorities across England and Wales. Presentations discussed included ‘access to quality childcare (which can prevent high cost residential care), the challenges faced by local authorities in a climate of limited funding and restructuring and a review of legislation as it applies to parent carers’.

Also presented were key points from the Caring for Sick or Disabled Children research undertaken by the University of Leeds research team.

Other events included the launch of a campaign – ‘Between A Rock and a Hard Place’ highlighting challenges in implementing duties in the Childcare Act 2006, a ‘Cash in Hand’ conference – a think tank event on direct payments with a presentation and table top discussion led by West Sussex (RISE) ACE partner and an event for newly elected Assembly Members and carers at the Welsh Assembly.

The Contact a Family ACE Policy officer also delivered responses to consultation opportunities including:

- Childcare Act 2006: Section 12 Duty to Provide Information, Advice and Assistance
- Childcare Sufficiency Assessments
- Modernising the Regulatory Framework for Children's Social Services

Work was also undertaken with the Daycare Trust to organise a number of focus groups with parent carers to hear about their experiences of using, or not using, childcare; what works for them and what doesn't; what their ideal childcare situation would be; and any other issues that come up or that they would like to discuss about childcare. These views were fed into the London Development Agency ‘Listen to Parents’ project aimed at shaping childcare policy.

Care to Take a Look

It is also noted in reviewing this objective that the work described under Objective 3, in relation to the interactive policy tool, Care to Take a Look, developed by ACE partner Bridge Research & Development has made an important contribution to this objective as well.

This tool was developed for policy makers at national, regional and local level to support them in 'developing appropriate policy for carers. It gives context-setting information on caring and its impact through a system moving from the general (statistical information) to the specific (case studies), focusing on health, employment and social inclusion. It looks at caring across the life course, giving a picture of alternative life outcomes as they are affected by caring, and incorporates a tool based on the employers self-assessment bench-marking tool designed to help local authorities and other organisations assess how well they are supporting carers and think about what else they could be doing to improve their practice. It incorporates information drawn from the 2001 Census, accessible through a series of 'maps' for easy access.'

Outputs

There were a very large number of outputs from the DP used extensively by the partners working on this objective. Outputs specific to this objective were launch materials to support the dissemination of the series of CES research reports, the Employers Resource Pack, the Scottish and Welsh manifesto materials, the Scottish National Framework for Carers and Employment, DVDs, newsletters, conference

and other event agendas and reports, and extensive media stories (quite a lot of this is reported under the Action 3 evaluation report).

An additional output developed by Carers UK is a 'policy fish': a striking visual representation of the evolution of the case for carers as active contributors to the economic and social well being of society.

The policy fish charts the politicization of the carers' case and the significant influence that ACE (both in EQUAL Round 1 and 2) has had on demonstrating the economic and well as social implications of this issue. The 'fish' provides a visual chronological narrative of the work undertaken and the outcomes achieved over the last two decades with the most significant impact occurring since ACE began. It demonstrates how the EQUAL funding for ACE during a crucial period in the narrative has been able to deliver real value added and may have been able to increase the rate of distance traveled during the period of the last two EQUAL rounds.

Conclusions

The achievements of this objective have not only met what was anticipated, but have achieved a great deal more than could have been hoped for. The range of policy gains that occurred (partly it must be said as part of the work of ACE 1 and the momentum that has been built up over the years) has been quite outstanding.

The role of Carers UK and the deployment of its very sophisticated policy research and lobbying forces have been a critical factor in this achievement. The research from Leeds provided the DP with fresh and robust data to support the case to be made to policy makers at national and local level and Carers UK were highly effective in making optimal usage of this data.

The work of Bridge and the development of 'Care to Take a Look' made extensive use of real life stories and provided a very accessible new perspective to the policy discourse – a life course perspective – where it showed how caring is increasingly likely to be part of the majority of citizen's lives in the future. This tool also makes use of the Leeds research in providing local as well as national data for policy makers.

There was significant value added from the way in which the partners cooperated to ensure that the EQUAL investment was leveraged from the combined work of each partner and deployed for the widest and most highly effective dissemination. For this value added, Carers UK in particular must be commended.

Also striking is how the DP participation of the three local authority partners (Hertfordshire, Surrey and West Sussex) delivered some significant outcomes. Their reputation in practice (notably the HCC BEACON status) as well as their role in influencing the implementation of policy into practice (including their highly respected contributions to the CSCI 'State of Social Care' reports and the new Performance Assessment Framework) and the role of Carers UK in convening and

supporting engagement with key stakeholders such as CSCI and SCIE as well as the Department of Health all helped to deliver important achievements. Not least of these was the inclusion of performance indicators relating to carers as a significant item in the Social Care Performance Indicators Framework.

These local authority partners will continue to deliver real leadership ensuring carers are not only treated as per the required legislation but have helped to ensure that the importance of enabling carers to join, maintain or re-join the active labour market is now firmly recognised across the social care statutory delivery systems.

To have reached the end of ACE with a central role in shaping the new National Strategy for Carers and to have delivered a large body of new research to the policy discussions cannot be seen to be anything but the most outstanding achievement. The focus on not only the rights of carers in our society but the case for equality in the labour market and the benefits to the state, employers and individuals has helped to deliver these outcomes. The alignment with the objectives of EQUAL and the EQUAL Priorities is clear and unambiguous. In addition, the cooperation with leading delivery partners has delivered key achievements in terms of real service provision improvement impact during the life of the DP with very strong potential for a long tail of impact into the future.

The achievements in Scotland and Wales have also been outstanding. They have made really effective use of political opportunities (with elections to devolved administrations) to inject carers into the policy agenda and to gather strong

political support while at the same time building local service provision support and using the research from Leeds to underpin their case. Carers' issues, particularly in relation to employment, are now mainstreamed in the political agenda.

Objective 5

This DP objective aimed to ‘Develop a transnational partnership to develop and test methods for the transfer of policy evidence and innovative solutions to the labour market disadvantage of carers between countries, in relation to the provision of alternative care services which enable them to work.’

At a more detailed level, the specific objectives for the ACE transnational partnership were

- To create a basis of common understanding and commitment.
- To produce evidence for policy and service development.
- To produce and test common guidelines for mechanisms that support carers’ family and working lives.
- To produce a joint publication identifying the issues for carers and families, care workers and employers across the transnational partnership.
- To carry the key messages from the partnership to European actors of change, to translate them into mainstream policy and practice.

The evaluators were not required to evaluate the transnational partnership but rather to review the value added of the transnational partnership as a contributor to ACE2. While the activities below detail broadly what took place in transnational activities, the conclusions are focused only on the value of the transnational activities to the ACE DP including the activities which took place outside of the formal transnational partnership.

Activities

Many of the operational partners had representatives directly participate in transnational activities, and/or participated in study visits and attendance at transnational events.

Transnational activities in the second half of Action 2 included:

- Study visits to the UK from Italian, Estonian and Latvian partners hosted by several of the ACE DP partners
- Work was completed on the transnational toolkits
- Transnational steering group meetings were attended by the ACE National management team and the transnational coordinator from EISS
- DP members attended the seminar hosted by Italy in October – ‘Partnership and Participation in Service Delivery’. The Carers UK Equal Partners project delivered a presentation on local models of carer involvement
- There was an ACE DP study visit to the Netherlands which shared knowledge and experience of working with employers
- Nestor staff undertook a dedicated study tour to the Italian partners in January 2007
- Information for employers on how to develop carer-friendly employment policies was prepared for transnational dissemination led by Carers UK (ACE Management team) working with Italy and the Netherlands

Transnational work culminated in a transnational conference held on 26 March 2007 in the UK, attended by representatives from all transnational partnerships, and by ACE operational and policy partners.

ACE also contributed to the establishment of **Eurocarers**, the aims of which are to:

- Contribute to policy development at national as well as European level, supported by evidence based research.
- Promote mutual learning and an exchange of good practice and innovation throughout the EU.

Eurocarers was launched officially in Carers Week 2007 at an event sponsored by ACE in the European Parliament which also saw the launch of a cross party European Parliamentary Interest Group on Carers. ACE also co-sponsored a policy event in Brussels in October 2007, following the MEP Awards, which ACE supported through its sponsorship of the MEP Campaigning MEP of the Year Award.

Other transnational events that took place in the second half of Action 2 included:

- ACE workshop, European Social Services Conference, Vienna, June 2006
- MEP Awards, MEP Campaigner of the Year Award sponsored by ACE, Brussels, October 2006

- Launch of Eurocarers and Interest Group on Carers in the European Parliament, parliamentary reception European Parliament, Brussels, June 2007
- Eurocarers conference, Hotel de Ville, Paris, July 2007
- MEP Awards, Campaigning MEP of the Year Award sponsored by ACE, Brussels, October 2007
- ‘We Care, Do You: unpaid care and its role in a sustainable Europe’, ACE/Eurocarers Blue Skies debate in association with Parliament Magazine to launch Reports 1-4 in the Carers, Employment and Services Report Series, Brussels, October 2007.
- ‘Citizenship and Care in Cities and Settlements of the Future’, ACE/ICCC round table event, UN Age of Connectivity Dialogues, St George’s House, Windsor Castle, October 2007.
- Eurocarers policy seminar, Prague, November 2007.

Outputs

Outputs from the transnational work included:

- A publication identifying the issues for carers and families, care workers and employers across the partnership
- A toolkit for carers to support them to juggle work and care
- A toolkit for social care providers
- A toolkit for employers on carer-friendly working policies and practices
- A joint report on good practice for dissemination

Outcomes

Overall, the transnational work for ACE partners has led to increased awareness and knowledge of other EU country practices and experiences and also helped to build new networks and partnerships. Partners have gained a better understanding of issues for carers in Europe, and of European institutions.

Perhaps an unintended outcome but with the greatest potential future impact is how the UK research and policy development outcomes of ACE have been taken up to the EU level through the range of transnational activities and events, largely delivered by Carers UK. It has enabled Carers UK (and other DP partners, not least the Leeds research team) to develop a knowledge base on carers and employment issues across Europe, and to understand the mechanisms for achieving change at European level.

Conclusion

The transnational work has primarily helped to deliver for the ACE DP a firm footprint for the carers' agenda at the European Parliamentary level, to provide two key partners (Carers UK and University of Leeds) with a real leadership profile at a European level and positioned them for potentially significant further research and policy development activities which in turn will help to shape policy and practice in the UK and deliver to carers greater opportunities for equal opportunities in the labour market and more sustainable employment. It has helped both organisations identify what they want and need to do at a European level in order to further

research and improved practice to support the carers' agenda and to give them a roadmap for their future work.

Overall Conclusions

EQUAL PRIORITIES

Equal Opportunities

ACE has focused from its inception on delivering greater equal opportunities for a growing proportion of the UK (and European) citizenry i.e. those that find themselves during working age periods in their lives with caring responsibilities. The recognition of the needs of these carers so that they can maintain their active engagement in the labour market has extended the generally accepted categories of those for whom equal opportunities need to be considered and brought their needs into the mainstream.

The research undertaken during the life of the ACE DP provides important data about carers with a range of characteristics such as ethnic composition, economic status, urban /rural habitat etc. The reports provide some detailed findings relating to carers from particular ethnic backgrounds, carers with the heaviest (50+ hours pw) caring responsibilities and those most at risk from exclusion in the labour market. Overall, the research supports and builds on previous research in ACE that demonstrates the direct inequalities that are experienced by carers not only in terms of equality of opportunity to participate effectively in the labour market but also in terms of their (and their families) economic status and health.

Innovation

The evolution of the politicization of the rights of carers has been one of the most remarkable aspects of ACE. While there was a growing body of campaigners and supporters of carers prior to the first ACE DP, and the first round EQUAL ACE DP raised the carers' agenda in UK policy, ACE2 has delivered a profound change in the way carers' issues have been integrated into a range of policy discussion and changes – from flexible working to pensions and the rights of parent carers. Above all, the review of the National Carers Strategy achieved in 2007 and the centrality of the work of ACE in both gaining agreement for the review as well as participating in the working groups in the review process is a historical achievement.

Innovation has occurred in the way in which 'carers' have shifted from being a somewhat peripheral social problem to a matter of social and economic decision making encountered within the life course of a majority of the growing and aging UK population.

Innovation has occurred in the way in which carers have found a voice with a clear economic case grounded in robust research for services that support their right to work and equal treatment in the labour market.

There have been innovations in the way local service providers have responded to carers needs and the way in which employers have adapted to the realities of retaining and supporting carer employees.

The CES survey has generated a significant amount of original data on carers as well as important data from key informants (KI). The work not only provides global data from the CES, KI interviews and the Census data, it also has been disaggregated to provide directly relevant data to several local authority localities as well as to Scotland and Wales. In addition, significant new data mining has been carried out on Census data and has resulted in additional important insights in addition to the comparative analysis with CES data.

Empowerment

Empowerment has been a focus and a result of ACE. In particular the work of Equal Partners has shown how carers can be empowered to drive a policy agenda and effect changes in local services.

The policy changes that have occurred in the ACE 2 period, driven in part by the work of the DP, have demonstrated how empowered carers can achieve legislative change. In addition, the change in the Social Care Local Services Performance Indicator is probably the single strongest evidence of the power shift towards the carers' agenda that has occurred during the life of ACE.

Empowerment was at the heart of the objectives of the ACE National research undertaken by the University of Leeds and the successful delivery of this research has meant that the DP has been able to deliver information into the hands of carers and their representatives, policy makers and the DP delivery partners that will

further empower them to make the case for policy and service practice change in the future.

Dissemination

Although much of the dissemination since mid 2006 has been carried out under Action 3 (separately reported), it should be noted here that the DP has been extremely effective in disseminating its messages and outcomes and very active in seizing all available opportunities to raise the subject of carers and equality treatment in employment and the labour market. All dissemination under Action 2 was well focused and directed to support the work of partners, and was well planned and effective in gaining the attention of their stakeholders and policy makers.

Overall Final Conclusions

As the results of the 'scorecard' questionnaire show (Appendix 1), the majority of DP partners believe they have been able to deliver considerable value through ACE to improving the opportunities for carers in employment and the labour market. All respondents consider they have achieved and in many cases exceeded their own as well as the DP's objectives in achieving its planned outcomes.

The DP has met fully the objectives and priorities of EQUAL and has shown itself to be a flagship model to deliver real impact with the potential to continue to deliver impact for a long time to come. The CES research (as evidenced in the large body of

report outputs) demonstrates significant distance travelled in terms of the state of the art in knowledge relating to this field.

The DP as a mechanism in helping to deliver the outcomes has proven to be of significant importance. It brought together researchers, operational (service delivery) public and private partners, a number of individuals and representative organisations with a determined focus and direct experience of carers lives and a lead organisation (and other partners with a strong policy building and lobbying role) with very sophisticated policy development and lobbying expertise.

The interaction and exchange across the DP was extremely high and the lead partner is to be commended for creating the processes and conditions for this to occur. The research undertaken by Leeds was strongly connected to the DP's policy activities. The researchers were also closely connected to the operational partnership through data collection for the CES and also through their regular and active attendance at local and national events. It provides a model of 'research and practice' exchange in the domain of socio-economic research that demonstrates significant value added delivered through the EQUAL investment.

This way of working has been absorbed particularly by the Leeds research team and Carers UK and there are plans going forward to replicate and continue to build on this type of multi-disciplinary and multi-stakeholder research and practice exchange – showing rapid but robust application of research into actual policy development and helping to provide support and credibility to practice innovation.

The latter through the many pilot activities of the operational partners has helped to provide the researchers with examples of innovation and creative responses to carers' needs that have helped to inform their work.

A strong indication of sustainability is how the research outputs have been used by Carers UK in particular to push the policy discourse forward now underpinned by such strong empirical research. It has also been used to directly support the work of Carers UK and the senior representatives from the local authorities in the partnership in their discussion with key service delivery systems players such as CSCI and SCIE; helping to contribute to the decision to allocate 15% of care service delivery assessment points to indicators relating to carers and more current discussion on how to make the way the assessment indicator is calculated more meaningful as a true reflection of how carers can benefit from improved service delivery.

In addition, the exchanges between research and service delivery (especially involving public sector stakeholders) have helped to demonstrate that the delivery of real impact for all citizens as carers needs to be firmly embedded in the government's transformation agenda. One potential strand going forward from the DP (and again demonstrating the resulting research and practice exchange process that has occurred and matured during ACE) is the potential for longer term close relationships between the Leeds research team and some of the local authorities that are leading policy and practice. These relationships are aimed at using research to underpin and support practice change and in exchange, to make

‘visible’ processes, systems and practices that can enable the researchers to map what actually occurs and where improvements can be made that have the potential for real impact. A critical aspect of this will be identifying where the state can act as a real enabler of support for carers as citizens when and as is needed rather than simply focusing on the delivery and funding (with declining budgets) of services to an ever growing proportion of the population that will be carers in the future.

At the end of the DP, the partners are awaiting the final recommendations on the new National Carers Strategy. They are to be commended for reaching this milestone which could not have been imagined at the start of the DP.

In the words of the University of Leeds research team leader Prof Sue Yeandle ‘this was one of most rewarding and exciting projects I have ever been involved in. It couldn’t have achieved any greater level of impact; a lot is due to Carers UK and their ability to push findings out into the policy and service provider arenas; it was off the scale!’