

5050vision - The North West Forum on Ageing – Evaluation

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Services for life

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Executive summary

Introduction

1. 5050vision is the North West Forum on Ageing. It was the first regional forum on Ageing to be set up in the UK. It is an ambitious and novel venture established and run by a large number founding partners and stakeholders. 5050vision responds to a particularly challenging agenda – ageing and its economic opportunities and challenges – in a particularly innovative way that involves influencing and adding value to policy and decision makers.
2. This evaluation focuses on:
 - An assessment of the project's net outputs and how it is contributing to relevant outcomes.
 - Identification of the key achievements.
 - Consideration of whether and how the project has achieved its initial objectives and whether it represents good value for money.
 - How the project contributes to wider objectives – in particular those relating to the Regional Economic Strategy - RES – and higher level outcome measures.
 - Statement of the continued need for the project or similar interventions.
 - Identification of whether the project should be improved to increase effectiveness, drawing on lessons learnt and good practice.

5050vision in context

An active regional partnership

3. Launched in 2003 to bring together organisations to identify and promote the understanding of the issues relating to demographic change and the over 50s, 5050vision remains a relatively young partnership. However, despite its relative infancy, we are pleased to report a partnership that has evolved, matured and achieved a considerable amount in a short period of time. 5050 vision describes itself as a “strategic partnership of public, voluntary and private sector organisations and interests”. The focus of the partnership is on influencing policy and decision makers to act to exploit the opportunities offered by the over 50s and to support their continued contribution to the labour market, to business and enterprise and ensure their skills and knowledge remain available to the region. In addition to these ostensibly economic foci, 5050vision also works to influence policy and decision makers to address health inequalities experienced by mid life and older people.

An evolving strategic partnership

4. Again, despite its relative infancy, 5050vision has evolved and matured as a partnership. At its inception the focus of the partnership was on awareness raising, engagement and consultation. To an extent, our consultees feel that these things were achieved well – although a consistently expressed view was that at throughout this period a stronger focus was needed to ensure 5050vision maximised its impact, with what was a very limited resource. Indeed, at its inception the staff complement of 5050vision was limited to a part-time development worker. The development worker played what is best described as a *supporting* role in 5050vision with other partners directing the forum and taking the lead on its activities.

5. Over time however, we are again pleased to confirm that the calls for greater focus have been substantially achieved. 5050vision can now concisely articulate its mission and can legitimately point to a business plan that is substantially more focused than its predecessor. It is our view that the installation of a part time “Chief Officer” and part-time “Project Officer” was instrumental in this shift in emphasis. This was also a consistently held view of our consultees.

The partnership today

6. Today 5050vision continues to focus its energy and resources at influencing policy and decision makers. The focus of its activities is largely enshrined within the 2006-2008 business plan. This focuses on four main themes:
 - employment.
 - skills development.
 - business and social enterprise.
 - health inequalities.
7. Operationally 5050vision works to achieve its objectives via a range of approaches. One of the main mechanisms involves bringing organisations together to identify and promote issues relating to demographic change and, through partnership working, encouraging these to be taken into account in the formulation of regional strategies and policies. The staff team (of two part time workers) plays a directing / leading role and co-ordinates the work of the Task Groups. There are currently two of these:
 - The “Mid-life and Older Peoples’ Regional Health Task Group”.
 - The “Older Workers Task Group”.
8. In addition to these two “formal” task groups, there is also an “ad hoc” task group which has been formed specifically to focus on research activity. We can confirm that all task groups are both supported by and endorsed as good models by the overwhelming majority of our consultees.

Additionality and added value

Additionality

9. Using the two evaluation principles of “plausible” relationships and “multi-criteria analysis” the evaluation discovered the following as examples of where 5050vision has added clear and demonstrable value to the work of its partners and stakeholders:
 - The creation of a *multi agency response* to the ageing problem. Through a series of PMG meetings, Task Group meetings and one-to-one sessions 5050vision have established new networks at a regional level. Many of these stakeholders did not previously communicate with each other on the specific issue of ageing. Voluntary Sector NW, for example were able to identify a funding stream for one of their projects through the network connections they made through the 5050vision meetings. VSNW were eager to highlight to us that this connection helped to raise awareness of resources that, once secured, helped to keep a project operating at a time when it would otherwise have had to shut down. This outcome – had it occurred – would have negatively affected around 50 older people – although VSNW were unable to quantify the precise effect.
 - Contribution to the Regional Economic Strategy. Through their comments made on a Draft of the current RES and via their broader awareness raising work, 5050vision have

successfully placed ageing within the latest RES via the insertion of Action 62 on the ‘promotion of older workers to employers’.

- Undertaking of assessment work on the requirement for an on-line skills assessment tool and discovering that Learn Direct were intending to do a similar thing and via this brokering an agreement to share resource and expertise with them. The tool, once developed will sit on the public domain of the Careers NW site and benefit from the utility of that site - which previously has been clearly aimed at young people. So that was an indication of the shift in thinking of the RDA and the raising of awareness of 50+ opportunities by 5050vision.
- Cumbria PCT is introducing new policies including ‘health trainers’ and are re-directing resources on community education towards older people. Although, to some extent this is likely to have happened anyway, Cumbria PCT believes that 5050vision was the stimulus for it happening *earlier* in Cumbria than it otherwise would have.
- JCP have developed interventions to help older people stay in employment longer even when faced with health problems. This is achieved through a caseworker who acts as a conduit between individual worker and employer. JCP used 5050vision research on the barriers to employment faced by older people to develop this intervention.
- Support with Funding Applications and promotion of a partnership approach to funding. For example, 5050vision have improved the quality of an ESF bid for funding (JCP) and provision of support in respect of LEGL bids and ‘city pathways project’ to help people aged 50+ get off incapacity benefit (Age Concern Blackburn with Darwen).
- Promoting the availability of the “Regions for All Ages Toolkit” which provides a comprehensive briefing and linked series of questions to focus policy-makers on the key issues presented by demographic ageing in the context of regional policy. It is intended to ensure that regional organisations can fully consider the issues of an ageing population and ‘age proof’ documents. This has been widely used by the stakeholders themselves and, we are led to believe, by Councils and House builders. This will significantly improve the situation for a lot of older people in a wide variety of different circumstances.
- 5050vision and Age Concern jointly had a significant influence on National Age Equality Policy that ensured that job applicants should be free from discrimination on the grounds of age.

Added value

10. An overwhelmingly supported observation from this evaluation is that all stakeholders interviewed thought that 5050vision represented value for money and added value to their work. Additionally, many stakeholders have identified that the partnership allows the region to “infuse a debate” about ageing both deep and wide across a wide range of organisations and stakeholders. For a limited level of financial investment into the partnership and its administration a wide range of organisations are engaged and influenced in the ageing debate and informal network structures and opportunities created.

Achievements and outcomes

11. 5050vision has both matured and evolved as a partnership and its work have created a wide range of outcomes. The main body of the report described the main achievements of the partnership (against each of the key themes that guide its work) and below we summarise what we see to be the main outcomes that have been generated:

- The work of 5050vision has helped to create an improved level of **awareness** amongst stakeholders and partners about the challenges and opportunities of demographic change.
- The work of 5050vision has contributed to improvements in the **quality and reliability** of demographic **data** available to policy and decision makers in the region (and nationally).
- The improved level of awareness and access to better information and data has seen some organisations **better reflect** issues of ageing in their **policies and strategies**.
- 5050vision have installed a new system and structure for **leadership** on ageing and demographic change. Leadership is being achieved via the organisation being known as *the* forum on ageing. It is also the product of the association of key individuals within the partnership influencing their respective organisations and strategies.
- The work of 5050vision has created new levels and types of regional **capacity** to respond to and reflect ageing and demographic change capacity within stakeholder organisations through their involvement in the Task Groups.
- The work of 5050vision as a brokerage partnership has led to greater alliances between organisations and built greater capacity to deal with the issue of ageing.

12. Some specific outcomes that have been created within individual themes of activity include:

- The work of 5050vision has meant the ageing agenda is now embedded in the RDA's skills team and policies.
- The work of 5050vision has placed the ageing agenda *on the agenda* of the enterprise team within the RDA.
- The work of 5050vision has influenced the new NW Enterprise Forum and new enterprise strategy.
- The work of 5050vision has led to the introduction of a champion in the RDA's enterprise team on ageing.

Lessons learned

13. Without doubt 5050vision is an influential partnership and one that has an overwhelming amount of support from the organisations consulted during the evaluation study. Despite its relative infancy, we are pleased to report an organisation that has evolved, matured and achieved a considerable amount in a short period of time. There are numerous plaudits for the partnership and it would appear to be in a credible position from which it can develop. To build on the successes, we suggest that attention is paid to the following "lessons":

- **Focus is key:** all of our consultees have confirmed that the credibility of the partnership improved when it began to "sharpen" its focus via the current business plan. Our own review of the main documentation would confirm this also and the shift in emphasis in key documentation is evidence of an organisation "getting to grips with" its area of focus and priority. The same commitment to focus should be honoured in future iterations of the business plan. In considering this, a clear delineation should be made between issues that are inherently strategic and objective orientated and those that are action orientated. The adoption of SMART objectives should be encouraged.
- **Continue to target those organisations where there is scope for influence:** 5050vision has proven itself able to add considerable value to organisations that are affected by the issue of ageing but for which it is not the main focus of their work.

Examples here include those for whom the partnership has run workshops, or how have been targeted for conferences. They include SSCs, SSPAs, ACAS, Enterprise Agencies, Colleges, Business Associations, CBI, NHS managers and HR Directors, SRPs, LAs, CCs, Business Links and many more. The future ability of the partnership to bring new perspectives, new information and new opportunities to these organisation is a real asset and one that the organisation should continue to leverage. The future focus should remain on “preaching to the unconverted” and the partnership should not be allowed to become distracted from this in any event.

- **Reliance on key individuals:** credit is clearly due to the two part time members of staff that service the partnership. Both of these individuals – the chief officer in particular – have received consistent positive feedback from our consultees. Whilst this should be seen as a “good thing” it creates an inherent level of vulnerability within the partnership. The Executive Committee and indeed broader partnership need to consider this vulnerability when making decisions about the future direction of the partnership.

Statement of continued need

14. In the North West *no other organisation* is solely focussed on the issues of ageing. 5050vision has been able to bring organisations together, influence them and essentially fill the gap in people’s awareness, understanding and knowledge of ageing. Without them there would be a void in knowledge and interaction between these organisations. However, despite progress to date, there remains a long way to go to bridge the gap between the main players, and the wider audience. As the evaluation has demonstrated the ageing agenda is closely linked to the work of many organisations. It is an area that requires a “joined up” approach to strategy and delivery. 5050vision plays a role – and should be actively encouraged to continue to play a role – in providing the “glue” between a wide range of complex organisations and structures, thereby helping to join up organisations and their policies.
15. The evaluation has demonstrated that many of the stakeholders firmly believe this is best achieved by one organisation – with a prime focus on ageing. There is a sense that if the ageing agenda was incorporated in another organisation with a million and one objectives the focus and momentum would be lost. At a strategic level there remains a need to alter employer and employee perceptions and policies on the older worker. There likewise remains a requirement to support policy development and the adoption of new, sometimes innovative ways of changing the focus of mainstream services to respond to the opportunities and challenges of an ageing population. Without a partnership such as 5050vision and the structures that it has established, the region would be certain to be asking itself questions about how to respond to these issues.

Conclusions

Towards a policy led position

16. The manner with which the North West responds to the economics of demographic change today, will clearly affect outcomes that occur tomorrow. The region’s current approach is clearly a multi-layered one, with numerous organisations contributing in different ways. Part of the focus of 5050vision is to work with these organisations and bring coherence and integration where this is required. In most cases this works well, but a view expressed to us throughout our consultations is that these arrangements could be made to work even more effectively if the region had an agreed *policy position* that reflected where the focus of regional priorities should lie.
17. The rationale for the development of a policy on ageing is a strong one. It is defined by:
 - The nature and scale of economic challenges and opportunities that confront the region as a result of its changing demography;

- A changing European policy context which will set the scene for future European investment;
 - The need for a more cross cutting regional approach that integrates the opportunities and challenges of demographic change with existing regional delivery approaches;
18. A policy position could not only help with the identification of future investment opportunities relating to ageing, it could assist with the future monitoring and evaluation of these (including 5050vision). This evaluation has highlighted the difficulties of measuring the impact of the investments made into 5050vision. Part of the reason for this has been the absence of SMART¹ objectives, which of course could be developed as part of a regional policy.
19. The focus of the policy should, in our view, be initially an economic one. This economic focus should however be broad – reflecting on the one hand issues of social, health and economic exclusion whilst on the other, issues of enterprise and business development. The policy should obviously work within the existing regional strategic framework, but should be sufficiently flexible to cope with future changes to this (including future Regional Economic Strategies, the possible Integrated Regional Strategy and a changing European policy context). The policy should seek to build on the lessons learned from other initiatives that adopt a cross cutting approach (for example Women’s Enterprise) and find identify cost effective ways of integrating ageing into existing delivery structures and approaches.
20. Without writing the policy itself, we would suggest that the main themes or areas that should be covered by it include:
- Maximisation of the economic opportunities associated with ageing, including:
 - Entrepreneurship and business start ups and business survival;
 - Increasing economic activity rates amongst the over 50’s;
 - Maximising the skills contribution made by the over 50’s;
 - Exploration and maximisation of business development and innovation opportunities associated with a changing demographic.
 - Minimising the impact of social and economic exclusion effects of ageing, including:
 - Health inequalities;
 - Financial exclusion.
21. Of course, 5050vision already has a great level of understanding of these issues and the partnership will have its own views on the content and focus of the strategy. The above points are a “starter” that should be refined and developed through dialogue.

5050vision

22. 5050vision is the North West forum on ageing and obviously plays an important role in influencing policy and decisions that affect the region. This evaluation has discovered a partnership that does these things with credibility and the support of its stakeholders. A continued role for the partnership has been argued as necessary as a conclusion of this

¹ SMART refers to objectives that are Specific, Measurable, Action orientated, Realistic and Timetabled.

evaluation. Learning lessons have also been identified. Amongst these are the need for the partnership to be focused in its work and target its resources at those areas where it can add the most value (often working with organisations and stakeholders who are the “not yet converted”). The adoption of a regional policy will significantly help 5050vision in achieving this focus.

23. Currently 5050vision is reliant upon funding from the NWDA to continue its current work programme. In our view that based on the strength of the evaluation, a continued role should be encouraged. That will, of course, require resource and again, it is our view that resources should be made available, providing that attached to it are the necessary conditions to allow for each of the learning lessons identified at 7.2. We would see no major difficulty in the partnership addressing the first two of these (achieving stronger focus and working with “unconverted” organisation). The final point (staff resource) is slightly more complicated, with the current Chief Officer having made it clear that she will be pursuing new opportunities in the new financial year. Of course, the vacant position can be filled, but this is likely to take time and provision for this must be made now. Any funding agreement must however recognise that the partnership may have its capacity somewhat constrained as part of any interim arrangement.
24. On the basis of form following function, funding for 5050vision must also recognise that its role and focus may change as a result of the production of a regional policy. Flexibility must then be built into any funding agreement and an acceptance of the need to be flexible must likewise be a feature of 5050vision in the short term. The need for flexibility should be seen by all parties as a positive step. The corollary of an agreed policy position is that the NWDA is committing to developing a long term policy for ageing in the region. This is a positive outcome for the partnership.

Recommendations

25. It is in the context of the above remarks that we have structured the following recommendations. These are directed at the NWDA as the client to the evaluation. Beyond these, we also make recommendations directed at 5050vision itself, which deal with the immediate issues of funding and the partnership’s measurement of outputs and outcomes.
 - Recommendation 1 - The NWDA should initiate the process of developing a policy on ageing for the North West. This should include many of the aspects highlighted earlier and the policy should be a document that encourages organisations, especially the RDA itself, to adapt and find new ways of incorporating ageing in its main programmes and other policies.
 - Recommendation 2 – interim funding is awarded to 5050vision to cover its operational costs up to the point at which its form and function can be reviewed to reflect the new regional policy position.
 - Recommendation 3 – any future funding for 5050vision should be awarded on the basis of the partnership having a more developed approach to demonstrating its impact. We emphasise that this is far from a criticism, but rather a recognition of the innovative nature of the work of the partnership to date and its focus on influencing and adding value. That future approach should recognise the need for:
 - SMART objectives – that are focused on the achievement of agreed outcomes specified within the 5050vision business plan
 - A stronger focus on demonstrating contribution to agreed outcomes (many of which we have highlighted in this evaluation);

- Insisting that its partners and members – when making use of the services of the 5050vision team and resources – agree, where possible, specific Key Performance Indicators that allow activities to be linked to outcomes;
- Joint training sessions between 5050vision and the NWDA evaluation team to develop and agree future evaluation framework measures that build on the findings of this study and other examples of good practice.
- Recommendation 4 – related to recommendation 3 then is a requirement at this point to refresh and review the partnership in light of the regional policy. Any changes in the funding and funding structure (if so required) for the partnership will need to be initiated in good time to ensure continuity.
- Recommendation 5 – The NWDA should disseminate the fact that it is producing a policy on ageing widely within its own corporate structures and this process should be led by senior individuals.
- Recommendation 6 – The NWDA should promote the positive outcome of this evaluation and highlight the good practice and learning lessons that needs to develop specific activities to achieve the policy.
- Recommendation 7 – the 5050vision partnership should proactively address any staffing issues associated with the possible departure of existing personnel through recruitment effort that is timed to minimise disruption to the partnership itself.

1 Introduction

- 1.1.1 5050vision is the North West Forum on Ageing. It was the first forum of its kind in the UK. It is an ambitious and novel venture on behalf of its founding partners and stakeholders. 5050vision responds to a particularly challenging agenda – ageing and its economic opportunities and challenges – in a particularly innovative way that involves influencing and adding value to policy and decision makers.
- 1.1.2 Tribal Consulting have been instructed to carry out an evaluation of 5050vision. This is far from a straightforward undertaking. 5050vision is a partnership and its activities are not like those of an organisation that directly delivers public services. Instead, its focus is on influencing, adding value and encouraging change in the policies and delivery arrangements for a wide range of other organisations. Evaluating how well an organisation does these things is fraught with complexities. Not least of these is the demonstration of “cause and effect” relationships between the work of 5050vision and a changing policy context that more effectively addresses the opportunities and challenges of an ageing population.
- 1.1.3 Notwithstanding certain methodological challenges, this evaluation is what the authors hope is a far-reaching review of 5050vision and a comprehensive and retrospective evaluation of its achievements and successes to date. The document also looks towards the future for 5050vision and sets out what the authors believe are an important set of recommendations for both the partnership and the main stakeholders that it represents and / or works with. These recommendations consider the future of ageing in the North West and the potential future focus of 5050vision in light of these.

2 The brief

2.1 Evaluation outputs

2.1.1 The specific outputs required of the evaluation were summarised in the “study brief” as:

- An assessment of the project/programme net outputs and how it is contributing to relevant outcomes.
- Identification of the key achievements.
- Consideration of whether and how the project/programme has achieved its initial objectives and whether it represents good value for money.
- How the project/programme is contributing to wider objectives – in particular those relating to the Regional Economic Strategy - RES – and higher level outcome measures.
- Statement of the continued need for the interventions or similar ones.
- Identification of whether the interventions should be improved to increase effectiveness, drawing on lessons learnt and good practice.

2.2 Our approach

2.2.1 In recognition of the nature of the 5050partnership and its influencing role, the study team adopted a deliberately consultative approach to the evaluation and a methodology based on the principles of “triangulation”. That principal of triangulation has meant that the study team have remained sceptical of any strongly expressed views that cannot be supported by documentary or other “hard” evidence. Instead, the evaluation results and study findings are based only on oral statements that have been backed up by hard evidence.

2.2.2 In practical terms the evaluation process has involved the following broad tasks:

- An in-depth desk-based review of the quarterly monitoring reports, the business plan, options appraisal and other supporting documents obtained from 5050vision.
- Detailed consultations with NWDA staff, executive board members, the project management team, delivery personnel and key stakeholders (*See Appendix A*).
- An analysis of the partnership’s “additionality” (both quantitatively and qualitatively) and quantification and analysis of the outcomes achieved.
- An analysis and assessment of Strategic Added Value and the value for money of the work of the partnership.
- A review of lessons learned and a comparison of similar initiatives and good practice elsewhere.

3 5050vision in context

3.1 A very active strategic partnership

3.1.1 5050 vision describes itself as a “strategic partnership of public, voluntary and private sector organisations and interests”. The focus of the partnership is on influencing policy and decision makers to act to exploit the opportunities offered by the over 50s and to support their continued contribution to the labour market, to business and enterprise and ensure their skills and knowledge remain available to the region. In addition to these ostensibly economic foci, 5050vision also works to influence policy and decision makers to address health inequalities experienced by mid life and older people.

3.1.2 Launched in 2003 to bring together organisations to identify and promote the understanding of the issues relating to demographic change and the over 50s, 5050vision remains a relatively young partnership. However, despite its relative infancy, we are pleased to report a partnership that has evolved, matured and achieved a considerable amount in a short period of time. Our detailed evaluation findings (at sections 5 and 6) paint a picture of a partnership that can confidently point to a large volume of achievements.

3.2 An evolving strategic partnership

3.2.1 Again, despite its relative infancy, 5050vision has evolved and matured as a partnership. At its inception the focus of the partnership was on awareness raising, engagement and consultation. To an extent, our consultees feel that these things were achieved well – although a consistently expressed view was that at throughout this period a stronger focus was needed to ensure 5050vision maximised its impact, with what was a very limited resource. Indeed, at its inception the staff complement of 5050vision was limited to a part-time development worker. The development worker played what is best described as a *supporting* role in 5050vision with other partners directing the forum and taking the lead on its activities.

3.2.2 Over time however, we are again pleased to confirm that the calls for greater focus have been substantially achieved. 5050vision can now concisely articulate its mission and can legitimately point to a business plan that is much more focused than its predecessor. It is our view that the installation of a part time “Chief Officer” and part-time “Project Officer” was instrumental in this shift in emphasis. This was also a consistently held view of our consultees.

3.3 The partnership today

3.3.1 Today 5050vision continues to focus its energy and resources at influencing policy and decision makers. The focus of its activities is largely enshrined within the 2006-2008 business plan. This focuses on four main themes:

- employment.
- skills development.
- business and social enterprise.
- health inequalities.

3.3.2 Our detailed analysis of achievements (again at sections 5 and 6) outlines the sorts of activities and initiatives that 5050vision has initiated, supported, influenced and encouraged within each theme. There is some variability in terms of the depth and

breadth of activity between the various themes, owing principally to the fact that some of these are more established than others. This is again explained in sections 6 and 7.

3.3.3 Operationally 5050vision works to achieve its objectives via a range of approaches. One of the main mechanisms involves bringing organisations together to identify and promote issues relating to demographic change and, through partnership working, encouraging these to be taken into account in the formulation of regional strategies and policies.

3.3.4 The staff team (of two part time workers) plays a directing / leading role and co-ordinates the work of the Task Groups. There are currently two of these:

- First, the “Mid-life and Older Peoples’ Regional Health Task Group”. This is a cross-sectoral group is established as a joint Health Task Group (HTG) between 5050vision and the Regional Public Health Team and is a designated regional public health task force. Its purpose is to support public health planning and to drive action. It will review the evidence base for health improvement and reducing inequalities in health in mid-life (50-65) and older people across the North West of England and create and share a clearer understanding; it will bring forward priorities and recommendations for action at appropriate levels of governance (regional sub-regional, local, community/neighbourhood); and it will drive action by influencing professionals and policy and decision makers.
- Second is the “Older Workers Task Group”. This is also a Joint Task Group on Older Worker and has been formed between the Image and Recruitment Group (of the Sector Skills and Productivity Alliances which are supported by the Regional Development Agency) and 5050vision. The task group aims to examine and promote good practice on integrating older workers into the labour market; and define the barriers that need to be overcome so that relevant agencies or decision makers can be alerted and action can be stipulated or recommended.

3.3.5 In addition to these two “formal” task groups, there is also an “ad hoc” task group which has been formed specifically to focus on research activity. Currently referred to as the “Research Steering Group” (focussing, on SMEs and Micro businesses), it includes a broad membership of organisations with an interest in research and the findings of this reflect their respective “host” organisations. It differs from the “Mid-life and Older Peoples’ Regional Health Task Group” and the “Older Workers Task Group” only in the sense that it is a single theme task group. Other than this, it shares most of the characteristics of the other Task Groups and consumes similar resources (though its inception has been much more recent).

3.3.6 The outcomes and achievements of the two task groups are considered later in the report. We can confirm however that these are mechanisms that are both supported by and endorsed as good models by the overwhelming majority of our consultees.

3.4 The “menu” of activities

3.4.1 In addition to the activities described above, 5050vision has articulated to us a broad “menu” of activities with which it is either regularly involved or which are reflective of the types of things that the partnership has in the past supported / delivered. 5050vision has also been able to provide us with evidence of each of these activities. These are explained in Figure 1. This is far from a comprehensive list – but it is reflective of the range of activities with which the partnership is involved.

Figure 1 5050vision activities

1. Identify key priorities for work of the partnership, create a business plan and secure funding for these.
2. Set up Task Groups as appropriate to research issues and prepare papers as required.
3. Commission research and other work as required. Influence the work of other relevant organisations involved in research.
4. Ensure demographic and other information relating to ageing in the North West is collected and made available to regional agencies.
5. Promote the findings of Task Groups to regional agencies and to the Forum network through publications, seminars, electronic means and any other form of appropriate communication.
6. Ensure that regional strategies and policies are scrutinised, and that issues relating to ageing and older people are brought to the attention of policy makers.
7. Work to develop effective systems of communication and debate with older people themselves and local organisations representing their interests, in order to ensure that older people can engage with and influence the policy making process.
8. Identify sources of future funding for '5050vision', for specific projects identified as priorities, and for publications and events.
9. Receive reports on the budget from the Project Management Group.
10. Play a full part as a member of the North West, Stakeholder Forum and other relevant consultation bodies as they develop.
11. Work in partnership with other regional Forums, to avoid duplication and to ensure co-ordinated activity where appropriate.
12. Review these Terms of Reference on an annual basis and make proposals for changes as the work of the Forum develops.

3.5 Partnership members

- 3.5.1 A full list of the partners involved in the membership of 5050vision is provided in *Appendix C*. In all we understand that there are 29 organisations represented by the partnership. The partnership – in our view – broadly mirrors the configuration of organisations one would expect to see in a structure that focuses on the topic of ageing. It therefore includes a broad spectrum of organisations representative of “ageing” (e.g. Age Concern, the North West Older Persons Advisory Group); organisations that have a labour market focus (e.g. the Learning and Skills Council, Job Centre Plus); those that have an economic development focus (e.g. the North West Chamber of Commerce, the Federation of Small Business); organisations that have a health focus (e.g. the Regional Public Health / DoH) and, of course, those that have a policy / strategic focus that covers each of these areas and more (e.g. the North West Development Agency, the North West Regional Assembly). Other specialist interest groups are also represented (e.g. the North West Rural Affairs Forum and the Regional Faith Group).
- 3.5.2 Unfortunately, due to the restricted timescale of this evaluation, we have not been afforded the opportunity to attend a meeting of the Partnership. We would have liked to have done so in order to witness the nature and operation of the partnership itself and the agenda of business with which it deals. We can however confirm that all but one of those interviewed spoke very positively about the administration of the partnership – citing the professionalism of the team and the chairing of meetings. Additionally, the consultant team also reviewed all the evidence from documentation, agendas and papers on meetings provided to us by 5050vision. These also bear out the views of the majority of the consultees.

3.6 The timing of this evaluation

- 3.6.1 This evaluation – understandably – comes at a point in time where 5050vision are applying for future funding from the NWDA. It is however somewhat out of sequence with the strategic and operational planning of 5050vision, which has, over the recent months, been involved in an “options appraisal” exercise which involved considering the future direction and focus of the partnership. Four options were considered by the partnership as part of this:
- Option A - do nothing
 - Option B - consolidate
 - Option C - change of strategic direction
 - Option D - increase resources and agenda.
- 3.6.2 The Programme Management Group recommended to the Executive Committee that Option B – (consolidate and maintain the unique selling point of 5050vision’s approach) should be selected as the basis of activity to secure the future of the partnership.
- 3.6.3 Ideally, the evaluation exercise would have informed this process. The fact that it has not is far from a “critical” issue – but it does provide an important context to our recommendations and these in particular will need to be cognisant of the time, effort and energy expended to date by the staff and the partnership in considering its future direction.

4 Ageing and demography – the issues and opportunities

4.1 Introduction

4.1.1 Whilst it was not a specific requirement of the evaluation brief to unpack the demography of the North West, the prevailing and future position is actually important to the evaluation. After all, the demographic and economic context that is being played out in the region is both central to the rationale for 5050vision and to its work and potential future focus. We are pleased to report that thanks to the work of 5050vision this exercise has been somewhat less challenging than it might have been. Their insistence for improved demographic information and joint work with the North West Regional Intelligence Unit has significantly improved the ease with which such exercises can be undertaken.

4.1.2 We emphasise that the inclusion of this type of analysis in the evaluation report is to help set a context for our recommendations.

4.2 An important economic issue

4.2.1 Demographic change and how to manage the impacts of it is now a key feature of European policy. Demographic change, including ageing, is being seen as one of the key challenges for European growth, and is likely to become a major focus for future European Commission activity and funding. It has been identified in a number of European Commission communications, in particular the September 2007 Fourth Report on Economic and Social Cohesion - Growing Regions, Growing Europe. This is currently undergoing consultation in order to set the scene for future European investment. The North West is actively engaging with the European demographic change agenda and the work of 5050vision should also be seen in this context.

4.2.2 The fact that people grow older is, of course, a basic reality of life. The fact that *more and more* people are growing older is however one of *the most prominent* issues of modern life. Ageing is a societal privilege and one of the great achievements of our modern age. Ageing presents everyone – policy makers, public service deliverers, voluntary and community organisations, private organisations, communities, families and individuals – with a wide range of challenges and opportunities.

4.2.3 Ageing is an area of modern society that is generally accepted as being one that cannot be addressed by the public or private sectors in isolation: it requires joint approaches and strategies (World Health Organisation, 2007). This observation, whilst simply expressed, is of profound and obvious importance to the evaluation itself: ageing requires that organisations collaborate, share information and practices, adopt new and where relevant common strategies and approaches and many other things. Having an organisation that facilitates these very things is then important.

4.2.4 Today, the effects of demographic ageing within different nations and regions vary. The “force” of the economic impact of ageing in any given region depends on a complex interaction of factors and events that are particular to the older population in that region: levels of disposable income; access to assets and credit; physical health; capacity and so on. Of course, as these factors vary from *between* different communities of place, then the impacts of ageing also vary considerably *within* regions.

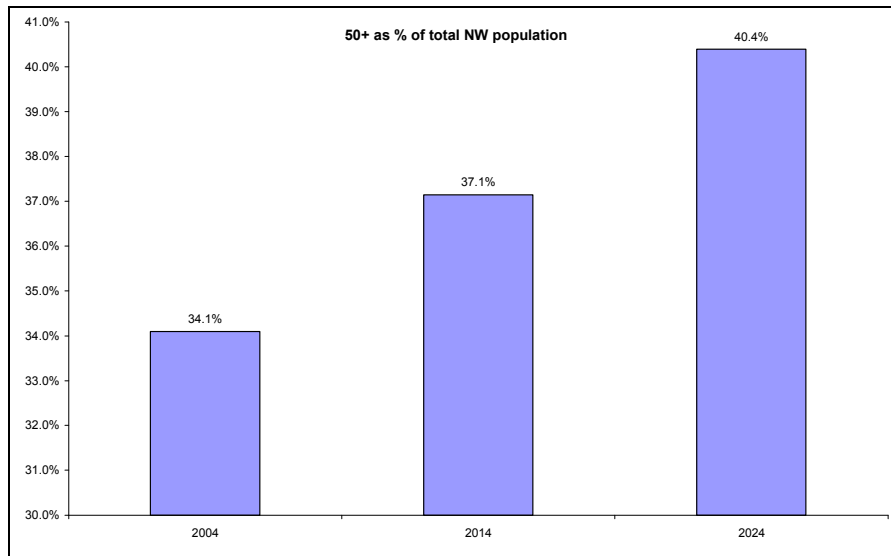
4.2.5 Much of the force with which demographic ageing will be felt in the *future* is a result of things that take place in the *here and now* (Lloyd, 2002). Work-life events in the here and now will “later” find some individuals with high retirement incomes, high net worth, good health and considerable human capacity in the more desirable places. However, at the other extreme, these work-life events will also see some people on low incomes, with little or no access to capital and credit, with poor health and low capacity in places with low amenity as they make their way into old age poverty and social exclusion.

4.2.6 For those with an interest in *competitive regional economies*, ageing is a significant issue. Nationally, the older population is growing at a proportionately faster rate than the rest of society. In the North West, currently 34% of the population is aged over 50. By 2024 the forecast is that this will have risen to 40%. The economic impacts of this proportionately growing population will depend significantly on their particular socio-economic characteristics and will have profound effects on both private and public organisations. For the private sector, if the weight of the older population is towards the *less well off*, there will be potentially substantial impacts on regional demand. Likewise for the public sector, if the balance of the older population is weighted towards the less healthy, there will be considerably *growing* demands on public services. Of course the hoped for position is that the ageing population is more balanced toward people who, in old age, will be self-sufficient, healthy and able to make a positive contribution to their own and others' lives. We explore some of these points in a little more depth at section 4.4.

4.3 The region in context

4.3.1 Over the next twenty years the growth in the number of people aged 50+ is estimated to be such that it will keep the North West population broadly constant (ONS, 2007). In 2004 there were 2.325 million persons aged 50+ in the region (accounting for 34.1% of the total population) and by 2024 this is projected to rise to 2.924 million (or 40.4% of the total population). This is equivalent to 12% growth over the period 2004 – 2024. This contrasts with the 20 – 49 age population, which is projected to decline by 3.6% over the same period.

Figure 2: 50s+ will keep NW population stable over next 20 years

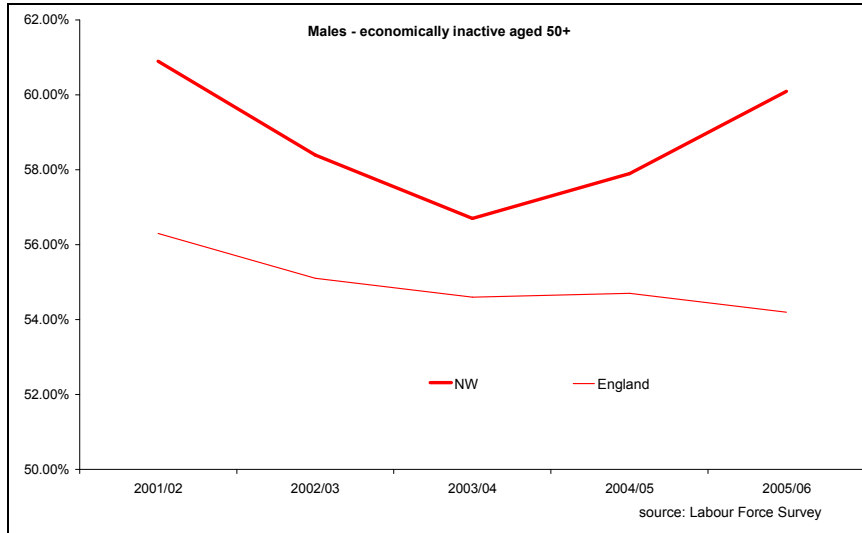


Source: ONS Revised 2004-based Sub-national population projections

4.3.2 Levels of economic activity amongst men aged 50+ are low in the North West. In line with the national average, male economic inactivity in the region had been falling from nearly 62% in 2001 to 57% in 2004. However in contrast to the national trend, economic inactivity amongst this cohort then started to rise and in the quarter December 2005 to February 2006, over 60% of men aged 50+ were officially recorded as being economically inactive. This is in sharp contrast to the national rate of 54% and falling. If greater proportions of men in their mid-life can be encouraged to extend their working lives in the NW region then *ceteris paribus*, it would have significant positive economic impacts, including growth in GVA and regional productivity and reduced social care costs. There is no compelling economic reason why older men should be less likely to work in the North West than in England as a whole. The employment rate and economic activity rate

across the population as a whole is broadly the same in the North West (77.6%) as for England (78.4%).²

Figure 3: Economic inactivity gap widens between NW and England

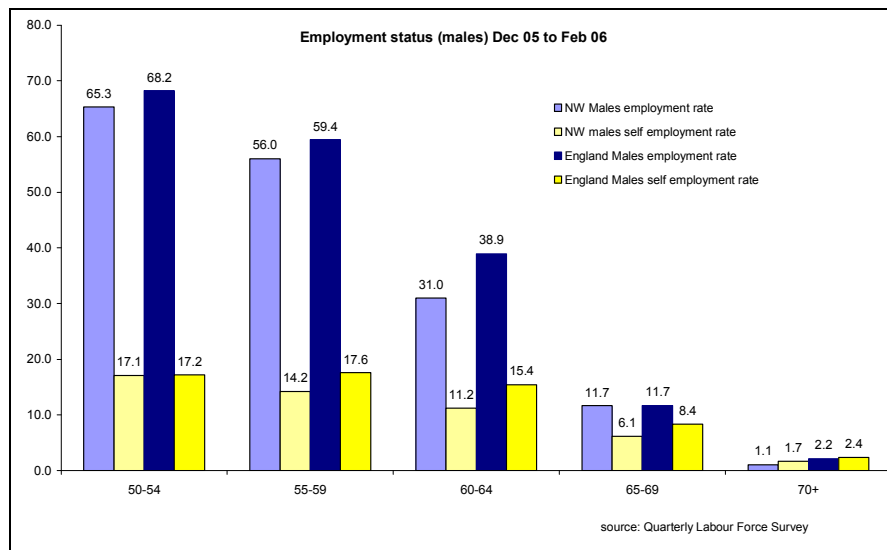


4.3.3 Figure 4 examines the employment status of different age groups within the 50+ category in the North West compared to England. In the 50 – 54 age group, there is a 3 percentage point differential in the employment rate of males in the North West (65.3% in employment) compared with England (68.2% in employment). Recent research indicates that whilst the North West employment rate has always lagged behind the England rate the regional rate has actually diverged further. The implications of this have not yet been assessed, but they are likely to be significant, signalling an almost stubborn gap between regional and national figures.

4.3.4 Males aged 60 – 64 are 20% less likely to be in employment than their English counterparts with an employment rate of only 31% compared to 38.9% in England.

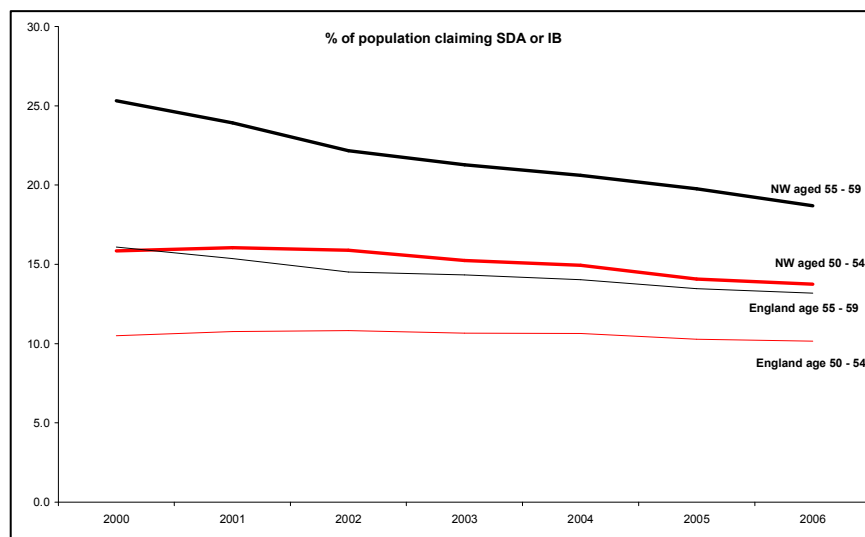
² Source: Annual Population Survey – economic activity rate and employment rate

Figure 4: Employment status dips considerably for the 60 – 64 age group



4.3.5 The final figure illustrates that older people in the North West are 50% more likely to be ‘off on the sick’ compared to England. Similarly the self-employment rate of 14.2% in the region much lower than the England rate of 17.6%.

Figure 5: Severe Disablement Allowance and Incapacity Benefit Claimants significantly higher in the NW region



4.4 A significant economic opportunity

4.4.1 The original establishment of 5050vision itself signals a recognition of many of the above regional issues. It likewise indicates an acceptance on behalf of its members and stakeholders to explore and take maximum advantage of the opportunities provided to the regional economy of an ageing population. For those that are less familiar with the subject area we have highlighted in the bullet points below a range of what we term “supply” and “demand” side opportunities. Supply opportunities refer principally the supply of labour, skills and entrepreneurial capital. Demand opportunities include a mix that relates to changing consumption patterns within society.

Supply side

- Economic growth is explicitly linked to increased labour market participation rates. If the older population is healthier and motivated to work then labour market participation rates can grow. This can, in turn, raise the productivity and economic prosperity of a region. Yet despite this, the older population still might decide not work unless attitudes and / or working practices change.
- The over 50's provide a more 'bankable' pool of new entrepreneurs. Many 50+ people combine years of working and life experience with access to capital. They can – and often do – offer a real source of innovation, expertise and experience and lower risk “investability”.
- From an employer standpoint, the older age group tends to be more stable and often a more committed workforce. The 50+ population are a skilled and competent pool of available labour that numerous large corporate organisations have already deliberately targeted for these reasons.
- There is huge potential for unpaid but vital activities to be completed by the 50+ population. Take for example paid and unpaid volunteers as well as those that perform caring responsibilities for friends and relatives.
- This bank of labour can potentially take pressure out of the skills supply system in areas of low labour market supply. They can address some of the skills shortages faced by many sectors in the UK.

4.4.2 From a “supply” standpoint many of these benefits can be recovered providing that employers and society more broadly are able and willing to accept more flexible working patterns.

Demand side

4.4.3 Demand side benefits occur as a consequence of a changing consumer profile. Of course the extent of these benefits will vary in accordance with the relative balance of the older population. A population that is more positively balanced toward people who, in old age, will be self-sufficient, healthy and able to make a positive contribution to their own and others' lives will benefit from:

- Accrued wealth from the past can which can be a strong stimulus to consumer demand generally.
- The new sources and types of consumer demand that emerge from the oft-termed “grey pound” or “third age” activities. Companies that adapt and respond to these markets will have a proportionally growing demographic to target their goods and services.
- Ageing is a phenomenon affecting every developed / wealthy nation. Innovators that target their products at this market have potentially access to global export opportunities.
- The multiplier effect on the extended pool of wealth will be substantial i.e. if more people are working this creates more wealth which inherently leads to healthier people, less pressure on the system and greater economic growth.

5 Added value, value for money and measurable outputs

5.1 Introduction

5.1.1 A requirement of the brief was to identify where and how 5050vision contributed to relevant regional outcomes and where the partnership has “added value”. Our introductory statement highlighted some of the methodological technicalities associated with this and this section discusses these and, building on those arguments, highlights where there is demonstrable and defensible evidence of 5050vision achieving added value.

5.2 “Causality” and “plausibility”

5.2.1 A key focus of the work of 5050vision is on influencing and adding value to policy and decision makers. From an evaluation standpoint, the focus of the partnership on these very things presents certain methodological challenges. The most significant of these – from an impact measurement standpoint at least – is the issue of causality and specifically, demonstration of there being a causal relationship between the inputs of 5050vision and the outputs of other organisations.

5.2.2 The NWDA have encouraged 5050vision and the evaluation team to consider the issue of *plausible* relationships. For the evaluation, this concept effectively means that the evaluation should look to produce evidence of their being a plausible link between the work of 5050vision and a change in behaviour, policy and /or delivery activity of another organisation / partner, which could potentially lead to changed economic outcomes. We can refer to these links as “logic flows”.

5.2.3 One example of a “logic flow” could be the work of 5050vision influencing the quality and availability of regional demographic data. This data is used by its partners and stakeholders in a) helping to better understand the issues and opportunities attached to regional demographic change; and b) formulating policy that better reflect and address the needs and opportunities of the ageing population / workforce. The activities and / or projects that have emerged from these policies include some that have been targeted at increasing levels of economic activity or entrepreneurship levels amongst the over 50’s. If successful, these activities will increase economic activity rates and therefore have a positive impact on such measures as regional GVA.

5.2.4 Of course, we cannot, via these examples prove the existence of a causal relationship between the inputs of 5050vision and the economic outcomes described, but we can assert that the former has a plausible link to the latter.

5.2.5 We are pleased to report that using this evaluation technique there are numerous instances of plausible positive relationships.

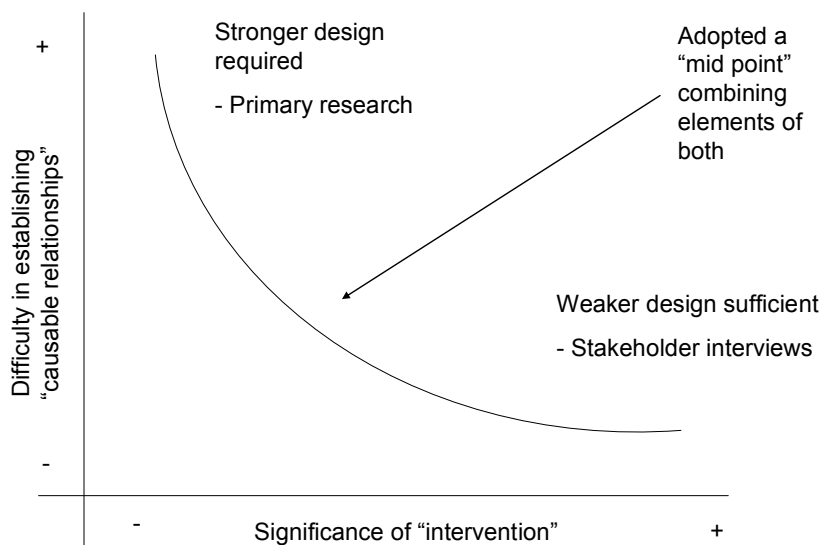
5.3 Our methodological approach

Data collection approach

5.3.1 “Evaluating the impact of Regional Development Agencies: Developing a Methodology and Evaluation Framework”; DTI Occasional Paper No. 2 (2006) outlines a range of suggested approaches for evaluating RDAs and RDA funded activities. One of the aspects of the paper that is relevant to this evaluation is that which describes options for collecting data for evaluation (see section 4.11). The document discusses how, in cases where causality is difficult to prove, primary research is often a helpful way of collecting data. Alternatively, where causality is more straightforward to define, the paper suggests that stakeholder approaches can be adopted.

5.3.2 Figure 6 provides a Tribal interpretation of the discussion contained within the report and outlines specifically the approach adopted by the consultant team for data collection. The diagram illustrates how we have adopted an approach that sits somewhere between both primary research and stakeholder interviews – the rationale for doing so being the need to uncover *plausible* relationships rather than exclusively causal ones (see section 5.3, above).

Figure 6: Basis for data selection approach



5.3.3 This “mid point” approach involved an extensive consultation / stakeholder interview approach, but one that specifically included common survey type questions that asked participants to identify tangible examples where 5050vision had:

- Helped to raise awareness within their organisation about demographic change.
- Encouraged their organisation to behave differently.
- Helped their organisation to develop new policies and procedures.

5.3.4 The findings from this exercise are discussed at section 5.4 and each point is based point is based on us having been provided with “hard evidence” of the impact being a tangible one and attributable (significantly) to the work of 5050vision.

Multi-criteria analysis

5.3.5 A further dimension of our approach has been the use of **multi-criteria analysis**. This is a technique that can be used to structure and combine the conclusions of an evaluation about the different achieved outputs and outcomes of an intervention. It is usually used to synthesise the judgements of the stakeholders in order to come to conclusions on the priority to be given to particular parts of the programme. In the case of our evaluation, the technique was applied by exploring areas where stakeholders were able to – without prompt – identify the same or very similar observations about the achievements of the partnership (e.g. a similar definition of value for money);

5.4 Added value examples

5.4.1

Using the two approaches described, we summarise below what we believe to be the additional impacts of 5050vision. These are things that the stakeholders specifically identified as being those that **would not have happened** if the partnership had not been established. These include:

- The creation of a *multi agency response* to the ageing problem. Through a series of PMG meetings, Task Group meetings and one-to-one sessions 5050vision have established new networks at a regional level. Many of these stakeholders did not previously communicate with each other on the specific issue of ageing. Voluntary Sector NW, for example were able to identify a funding stream for one of their projects through the network connections they made through the 5050vision meetings. VSNW were eager to highlight to us that this connection helped to raise awareness of resources that, once secured, helped to keep a project operating at a time when it would otherwise have had to shut down. This outcome – has it occurred – would have negatively affected around 50 older people – although VSNW were unable to quantify the precise effect.
- Contribution to the Regional Economic Strategy. Through their comments made on a Draft of the current RES and via their broader awareness raising work, 5050vision have successfully placed ageing within the latest RES via the insertion of Action 62 on the ‘promotion of older workers to employers’.
- Undertaking of assessment work on the requirement for an on-line skills assessment tool and discovering that Learn Direct were intending to do a similar thing and via this, brokering an agreement to share resource and expertise with them. The tool, once developed would sit on the public domain of the Careers NW site and benefit from the utility of that site - which previously has been clearly aimed at young people. So that was an indication of the shift in thinking of the RDA and the raising of awareness of 50+ opportunities by 5050vision.
- Cumbria PCT is introducing new policies including ‘health trainers’ and are re-directing resources on community education towards older people. Although, to some extent this is likely to have happened anyway, Cumbria PCT believes that 5050vision was the stimulus for it happening *earlier* in Cumbria than it otherwise would have.
- JCP have developed interventions to help older people stay in employment longer even when faced with health problems. This is achieved through a caseworker who acts as a conduit between individual worker and employer. JCP used 5050vision research on the barriers to employment faced by older people.
- Support with Funding Applications and promotion of a partnership approach to funding. For example, 5050vision have improved the quality of an ESF bid for funding (JCP) and provision of support in respect of LEGI bids and ‘city pathways project’ to help people aged 50+ get off incapacity benefit (Age Concern Blackburn with Darwen).
- Promoting the availability of the “Regions for All Ages Toolkit” which provides a comprehensive briefing and linked series of questions to focus policy-makers on the key issues presented by demographic ageing in the context of regional policy. It is intended to ensure that regional organisations can fully consider the issues of an ageing population and ‘age proof’ documents. This has been widely used by the stakeholders themselves and, we are led to believe, by Councils and House builders. This will significantly improve the situation for a lot of older people in a wide variety of different circumstances.

- 5050vision and Age Concern jointly had a significant influence on National Age Equality Policy that ensured that job applicants should be free from discrimination on the grounds of age.

5.5 Measuring value for money

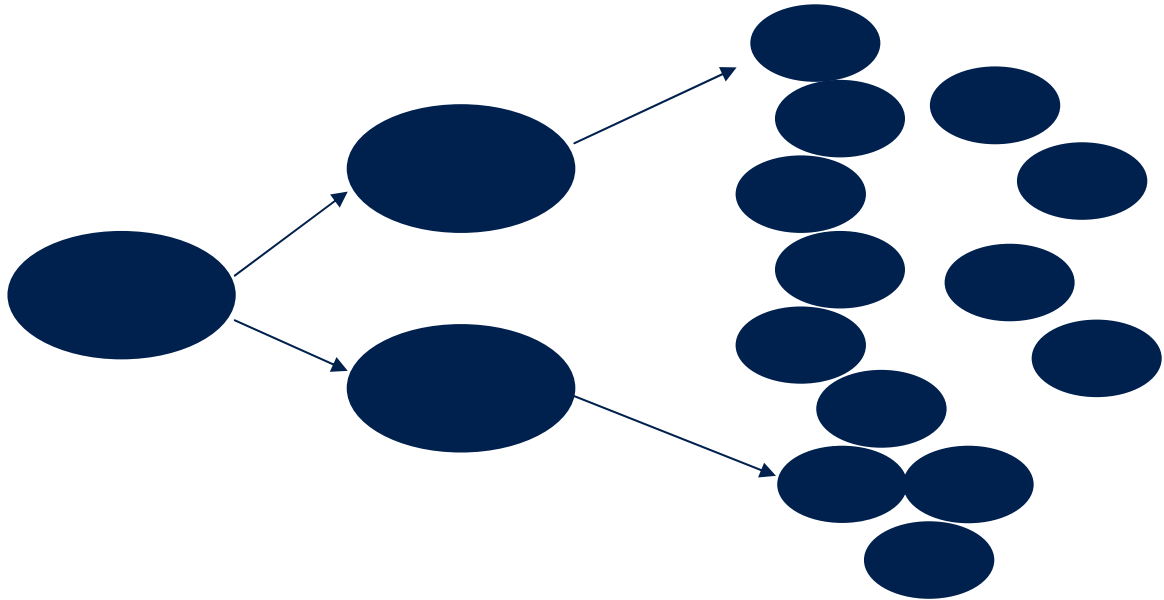
5.5.1 Measuring the added value of a partnership such as 5050vision is, again, complex. Yet an approach is possible – albeit somewhat less orthodox than the usual unit cost analysis techniques used in programme type evaluations. Our approach to this exercise built on our “multi-criteria” analysis technique and specifically involved the evaluation team looking for examples of a convergence in views amongst stakeholders about:

- First, whether or not stakeholders perceived 5050vision to represent a partnership that offered value for money; and
- Second, asking stakeholders to define how they saw that value for money in practical terms.

5.5.2 The first – and overwhelmingly supported observation from this evaluation is – that all stakeholders interviewed thought that 5050vision represented value for money. When prompted about what they thought it cost to operate the partnership, estimates varied but absolutely none were close to the actual value. All estimates significantly exceeded the current operational costs. Thus, the evaluation team can confirm that there is a convergence of view that the partnership represents value for money.

5.5.3 Secondly, when asked to describe *how* 5050vision represented value for money, many stakeholders broadly identified a similar theme: the partnership allows the region to “infuse a debate” about ageing both deep and wide across a wide range of organisations and stakeholders. Figure 7 attempts to illustrate the point – which is that for a limited level of financial investment into the partnership and its administration, a wide range of organisations are engaged and influenced in the ageing debate and informal network structures and opportunities created.

Figure 7 5050 vision “infuses a debate on ageing”



5.5.4 5050vision principally, because of the structure of the forum, the network relationships it creates and the influence that it has achieved by this, has been able to “get the message out there”. Through the partnership approach and members of 5050vision, the team has been able to access a whole host of organisations. This in turn has led to these organisations consulting with their colleagues and other organisations, and so on.

5.6 Measurable outputs

Targets and achievements

5.6.1 Figure 8 shows the measurable outputs recorded by 5050vision as part of its funding agreement with the NWDA. The outputs are to date, by quarter, starting with Q1 2006/06 through to Q1 2007/08. The table illustrates targets and actual outputs achieved.

Figure 8 Monitored outputs

Activity (Q1 2006/07)	Target	Actual
Briefings (organisations)	6	17
Briefings (sectors)	6	6
Conferences/networking/workshop events	2	6
Draft business plan dissemination	20	80
Establish full membership and representation of interests on the	Gaps	Filled

Forum		
Publish business plan (2006/08)	March 2006	√
Agree objectives and work plan to support business plan priorities	Publication of business plan	Published June 2006
Establish funding arrangements and sustainable infrastructure 06/07 and beyond to support the business plan	Funding agreed	Funding agreed 06/07 & 07/08
Arrangements for Chief Officer Post July 06 onwards	Agreed reached	√
Activities (Q2 2006/07)	Target	Actual
Arrangements for Chief Officer Post July 06 onwards	Agreement reached	√
Partnership agreements to be established with member organisations	Feb 2007	Draft agreements 19 th Sept 06
5050vision and partners NW conference	Conference	10 th Oct 06
Activities (Q3 2006/07)	Target	Actual
There were no project milestones specific to Q3 period ending Dec 2006		
Activities (Q4 2006/07) and (Q1 2007/08)	Target	Actual
Partnership agreements to be established with member organisations by Feb 2007	10	17
Report/interim report and action plan from Task Groups by April 2007	2	2
<i>Minimum interventions/contacts Sept 05-Mar 07</i>		
Employers	10	16
Intermediary bodies	10	15
Associated stakeholder	4	9
Sector Skills Council	3	12

5.6.2 When assessing the extent to which 5050vision has achieved its stated targets as detailed in the monitoring and chief officer reports, it is fair to conclude that all the targets have been met. Many of which significantly exceeded the actual target set. We can thus state with some confidence that from this part of the evaluation that 5050vision is doing what it said it would at the start of 2006 and has accomplished all the targets, and in many cases exceeded expectations and requirements.

Likely impacts of these outputs

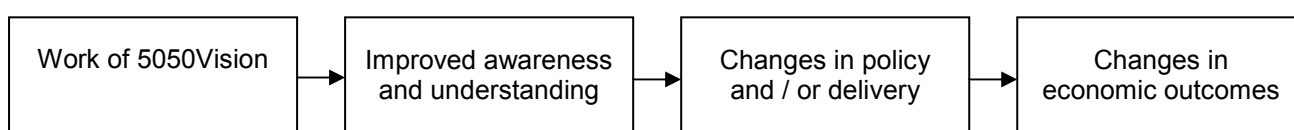
5.6.3 The contact with the partners, employers and stakeholders has influenced projects, research briefs and activities. The ageing issue has now been incorporated into a range of these activities. Take the Skills Team at the RDA for example, through the influence and persistence of 5050vision the SSCs are jointly working with 5050vision on the Older Workers Task Group. The SSCs have also incorporated ageing into their programmes. Similarly, the Enterprise Team, for whom, until recently, ageing was not a key theme now understands its challenges and opportunities. The intention is that 5050vision will be included within the updated RES as a key action in enterprise.

6 Specific achievements by “theme”

6.1 Introduction

6.1.1 This section of the evaluation looks at the main achievements of 5050vision against the main themes of the partnership (as enshrined within the 2006-2008 business plan). It builds upon the concept of there being plausible links between the work of 5050vision and economic outputs. Where the consultant team believe there is evidence of these plausible links, we have included specific examples in this section.

Figure 9: Plausible links between inputs and outcomes



6.1.2 In addition to the key achievements listed hereon being those that demonstrate plausible linkages, they have also been identified on the basis that they reflect a certain level of intensity of involvement by 5050vision. In the figures that follow, we have thus “weighted” 5050vision’s involvement for each achievement and action, using three categories:

- led the action (intensity level 1)
- influenced the action (intensity level 2)
- supported the action (intensity level 3)

6.1.3 Each figure outlines the details of the action, the possible outcomes/impact and the level of involvement by 5050vision, measured by the three intensity levels. Beneath each of the figures we also outline the types of overall “outcomes that have been created as a consequence of the work of 5050vision.

6.2 Key priority: employment

To contribute to the achievement of European workforce targets so that 50% of workers over the age of 55 remain in employment by 2010; to contribute to the reduction in the economic performance gap in the North West by targeting employers to act in their own interests to retain and secure future labour supply; to ensure that the needs of the over 50s for ‘quality’ jobs is understood in the context of employment practice.

Figure 10 employment priority “achievements”

Actions by 5050vision	Likely outcomes / impacts	Level of Involvement
Older Workers Joint Task Group established jointly with the Sector Skills and Productivity Alliances – Image and Recruitment Group. The task group will examine and promote good practice on integrating older workers into the labour market and to define the barriers that need to be overcome so that relevant agencies can be	It is expected that this will <i>contribute</i> to the achievement of employment targets (so that 50% of people aged 55 – 64 will remain in employment by 2010). But does not give a specific employment target for the Task Group.	Level 1

Actions by 5050vision	Likely outcomes / impacts	Level of Involvement
alerted and action can be recommended.	JCP advise that this research has helped them to identify the type of intervention that would be most appropriate to help older people re-enter the labour market and / or extend their working lives. They have developed caseworker support to advise and work with employers and older people.	
Older workers group: funding established to create an 'online skills assessment tool' linked to NW Careers Website. Careers NW site may act as the NW portal for Learn Direct national service.	Whilst the outcomes are in their relative infancy, the impact on training, and ultimately employment of older workers is likely to be significant because of the involvement of Learn Direct. This would be useful for people who may be considering a career change, a phased approach to retirement or faced with redundancy.	Level 1
Lead organisation for Action 62 (promote older workers to employers) in Regional Economic Strategy. This resulted in a discussion and advisory session with contact centre employer (Manchester insurance) and call centre employer (Preston) to recruit older workers working with Aged2Excel.	This is likely to have a potentially significant impact the attitude of employers towards older workers and will likely increase directly the number of older people employed in contact centres.	Level 1
<p>Instigating the "The Demographics study" which is an RIU commissioned study that updated information with which to target policy, strategy and action. 5050 vision partnered the RIU with others in its development and procurement.</p> <p>The formation of the <i>ad hoc</i> Research task Group and the initiation of the "Attitudes and Good Practice in the Employment of Older Workers in SMEs and Micro businesses in the NW", which is in the process of being commissioned by 5050vision. It signals how 5050vision can bring a range of stakeholders together and get them to commit not only to support the production of the research specification but to own the product and to take forward action in the NW.</p>	These research projects will produce specific data on the ageing population but more importantly raise the issues and awareness among key organisations and regional employers. Our consultees have highlighted the huge value placed on the exercises.	Level 2 Level 1
Differentiated demographic, employment and economic inactivity data obtained to support the ability to monitor the achievement of Lisbon Agenda targets and economic inclusion of the over 50s, for the first time in the region.	5050vision worked with the Research Team at the NWDA to collect the statistical data in the ageing population. This has in turn raised the debate and awareness of the key issues facing the region.	Level 1
Contributions to the North West Regional European Partnership.	Ensuring that emerging European policy issues are reflected in the work of 5050vision and thus in the awareness raising and communication of the partnership.	Level 3
Undertook a pilot research study through MMU 'Attitudes and Good Practice in the Employment of Older Workers IN SMEs and Micro-businesses in the NW'.	This report has been widely disseminated and now forms the basis of the wider NW study that 5050vision wishes to commission with partners and which will act as a catalyst for action in the NW through the specially formed ad hoc Research Steering Group.	Level 1

Box 1 – Outcomes of the employment priority “achievements”

The outcomes achieved by this theme are both generic (i.e. are relevant to other themes) and specific (i.e. relevant only to this theme. Those that are generic are:

- The work of 5050vision has helped to create an improved level of *awareness* amongst stakeholders and partners about the challenges and opportunities of demographic change.
- The work of 5050vision has contributed to improvements in the quality and reliability of demographic data available to policy and decision makers in the region (and nationally).
- The improved level of awareness and access to better information and data has seen some organisations better reflect issues of ageing in their policies and strategies.
- 5050vision have installed a new system and structure for *leadership* on ageing and demographic change. Leadership is being achieved via the organisation being known as *the* forum on ageing. It is also the product of the association of key individuals within the partnership influencing their respective organisations and strategies.

The specific outcome is:

- The work of 5050vision has created new levels and types of regional *capacity* to respond to and reflect ageing and demographic change capacity within stakeholder organisations through their involvement in the Task Group and skills on-line assessment. A specific component of that capacity is the creation of the Older Workers Joint Task Group, although the notion of capacity cuts deeper than structure. It also includes such issues as data and intelligence.

6.3 Key priority: skills development

To ensure that employers and intermediary bodies understand the requirement to invest in the continued training and development of older workers; to ensure that the priorities for regional skills development reflect the needs of current and future older workers including those who are presently workless; that ICT skills are recognised and provided for in appropriate ways; that the needs of potential silver entrepreneurs are appropriately supported whether in business or social enterprise.

Figure 11 skills development “achievements”

Actions by 5050vision	Likely outcomes / impacts	Level of involvement
Older Workers Joint Task Group established jointly with the Sector Skills Councils and Sector Skills and Productivity Alliance – Image and Recruitment Group (same as employment priority)	The ageing agenda is becoming embedded in the RDA’s skills team and policies, and the SSCs/SSPAs. Before 5050vision made contact with the SSCs/SSPAs., ageing was not considered in their remit.	Level 1

Partnering Lancashire Colleges Consortium bid for ESF funding "Using your Skills"	The outcome of the bid for funding was not known at the time of the evaluation.	Level 3
Agreement formalised with Universities of Manchester (MBS) and Chester to partner European FP7 proposal "Designing senior citizens ICT ecosystems". Bid submitted May07, results Sept07, programme start Feb08 (if successful)	The outcome of the bid for funding was not known at the time of the evaluation.	Level 3
Research projects 'Deconstructing Barriers' report (Construction Skills Sector) and the 'Equality and Diversity National Strategy'	Ageing is now included into both of these reports, and without the influence of 5050vision this would not have been the case. It is too early to show the impact this will have on these specific areas.	Level 2
Assisted the Cheshire and Warrington LSC in drawing up a £7m bid for additional funding. 5050vision participated in their procurement and award process in relation to projects aimed at disadvantaged groups specifically including 50+.	A more informed perspective and confidence around letting the tender.	Level 3

Box 2 – Outcomes of the skills development “achievements”

Many of the outcomes here are similar to those outlined within Box 1. Over and above these however, those that are *specific* to the “skills development” theme are:

The work of 5050vision has meant the ageing agenda is now embedded in the RDA’s skills team and policies.

The work of 5050vision has ensured that ageing has been incorporated in new policy areas and sectors.

6.4 Key priority: business and social enterprise

To increase awareness of the potential of enterprise development, including social enterprise and self employment as enabling factors for older people to remain economically active, to maintain their independence and play an active role in society.

Figure 12 business and social enterprise “achievements”

Actions by 5050vision	Likely outcomes / impacts	Level of Involvement
Influenced financial support from RDA for PRIME’s regional development and co-ordination of the 50+ self employment and business start up agenda.	The NWDA’s commitment to developing the PRIME programme shows how 5050vision has raised the profile of enterprise development for the over 50s.	Level 1

Joined RDA Cross Agency Group on Local Enterprise Growth initiative. Provided analysis in support of LEGI in respect of 50+ for the RDA.	5050vision provided data and knowledge on the 50+ population which as a consequence incorporated ageing into the proposed bid. Projects and programmes might be available for the ageing population as a result of this contribution.	Level 3
Supporting the Enterprise work stream of "Building Business Start Ups" (£9.25m RDA project supporting RES Action 3)	Clear focus on 50+ in RDA priority areas although this was more limited than 5050vision would have wanted to see included in the work stream.	Level 3
Supported the Voluntary Sector North West to identify a potential funding stream for a project through the networks established by 5050vision.	A voluntary sector project that benefited older people received funding.	Level 3
5050vision hosted an "Enterprise and Age Works" conference in October 2006 that was opened by Steven Broomhead NWDA Chief Executive with headline speakers from Merseyfilm (Phil Redmond CBE), The Mersey Partnership (Robert Crawford, Chief Executive) and the TUC (Alan Manning, Regional Secretary).	Significant kickstart to 5050vision's agenda around enterprise and 50+. Increasing recognition within RDA specifically on this aspect of the agenda; better and new networks with related agencies for 5050vision itself; invitation to join new NW Enterprise Forum etc; increased profile for 5050vision with a new audience; increased awareness and potential for action amongst this deliberately targeted audience of intermediary and other organisations.	Level 1
5050vision's concerns and contribution have been recognised in the formation of the new NW Enterprise Forum where they are represented at Steering Group level.	Their inclusion is likely to result in an enterprise strategy for the NW that is now more likely to respond to the needs and opportunities of the 50+ group of potential entrepreneurs or self employed.	Level 2

Box 3 – Outcomes of the business and social enterprise “achievements”

The work of 5050vision has gotten the ageing agenda *on the agenda* of the enterprise team within the RDA.

The work of 5050vision has influenced the new NW Enterprise Forum and new enterprise strategy.

The work of 5050vision has led to the introduction of a champion in the RDA's enterprise team on ageing.

The work of 5050vision as a brokerage partnership has led to greater alliances between organisations and built greater capacity to deal with the issue of ageing.

The work of 5050vision has led to production of specific data on ageing that will be used to inform future policy and strategy development.

6.5 Key priority: health inequalities

Use data and information from the new report on Health Inequalities in the North West "Where Wealth Means Health" (published Dec 05) and key policy documents, to determine the best contribution that a Health Task Group of 5050vision, operating jointly

with Regional Public Health partners and other stakeholders, can make to the reduction of health inequalities experienced by the over 50s. Contribute to the reduction in health inequalities for this age group through enhanced employment opportunity and provision of skills development to support those opportunities.

Figure 13 health inequalities “achievements”

Actions	Outcomes / Impacts	Level of involvement
Set up Mid Life and Older Persons Health Task Group – action plan developing over the period to March 2007.	5050vision have helped the specialist Regional Task Groups in the NW to focus on older people aged 50+. Regional policy tends to focus on younger age groups e.g. the Nutrition and Obesity task group tended to focus on children. There is some very encouraging evidence that they have begun to influence resource budgets in favour of older people. E.g. a new development is ‘health trainers’ – and they may have an increased focus on people aged 50+.	Level 1
Exploring the possibility of ‘age proofing’ the work of other public health task groups. First joint discussions held with regional Alcohol Task Group in Nov 06 and Food and Nutrition Group in Jan 07.	Ageing is now included in the alcohol strategy where before the focus was purely on the younger generation. This is the first evident impact in an approach that will eventually cover all of the specialist Regional Task Groups and not just Alcohol.	Level 1
Supporting one of two pan-regional (stage 2) bids for lottery funding, focused on older and vulnerable people in the context and food and nutrition, exercise and mental health.	This bid has been successful and is likely have a significant impact on the health and well being of older people. The Mid Life and Older Persons Health Task Group will form the basis of an Advisory Group on older people for specific aspects of the project	Level 3
	The findings from 5050vision research will feed into the Regional Age Concern (3 year) business plan	Level 2

Box 4 – Outcomes

The work of 5050vision has influenced organisations to include ageing in their strategies, projects and business plans.

The work of 5050vision has enabled partner organisations to build capacity within their own organisations on the ageing agenda.

6.6 Communication and promotion

Raise awareness of the opportunities presented by demographic change in the North West amongst key policy and decision makers; ensure that communication from 5050vision is efficient and effective and that the role of 5050vision is recognised and enhanced as a consequence.

6.6.1 Box 5 shows examples of conferences that are 5050vision’s own conferences (i.e. they have been initiated and held by the partnership), and examples of other organisations conferences at which 5050vision presented or conducted workshop sessions.

Box 5 Conferences

5050vision and partners NW Conference on “Enterprise and Age Works!” Oct 06

A conference is planned for February 2008 with the theme of ‘Employment’

Equality & Diversity from Education to Employment (LJMU and partner HEIs)

Warrington’s 21st Century Workforce conference (Warrington Learning Partnership)

6.6.2

Box 6 illustrates the organisations 5050vision has engaged with through formal workshop sessions and presentations to year end March 2007. This information is taken from the quarterly monitoring reports.

Box 6 Contacts

16 employers / coalitions (including SSPAs, call and contact centres, NW Flexible Working Group, etc)

12 Sector Skills Councils (including Retail, Logistics, eSkills, Production Skills, Skills for Health, Skills for Care, Construction Skills plus regular additional interaction through SSPA Image and Recruitment Group / Older Workers sub group with Lantra, People 1st, Food and drink and Chemicals).

15 intermediary bodies (including LSCs in the region, Business Links in region, new MD Business Link, ACAS, FSB, Chambers of Commerce, Enterprise Agencies).

9 associated stakeholders (including PRIME, TAEN, Women’s Regional Enterprise Group).

6.6.3

The partnership has been very clear that it does not have the capacity or the resources to manage large scale projects or duplicate the work of existing organisations. This has meant that 5050vision has tried to inform, communicate and engage with key bodies or individuals in as efficient a way as it can. It is therefore right that the chief officer and other staff should spend significant amounts of time in networking and developing contacts and relationships with organisations with complementary interests. All of figures 9-14 provide key highlights of their work in this specific area.

6.7

Policy development and influence

Ensure that the key policies and decisions taken by public private and voluntary sector organisations in the North West, notably employers and funding organisations, recognise and respond to the consequences of demographic change and that strategies are sensitised to the opportunities and needs of the over 50s.

Figure 14 policy development and influences “achievements”

Type of activity	Examples of activity
Responding to formal consultations	The national consultation on the Equality Impact Assessment of 2 Skills White Papers The Regional/sub-regional consultation events on ESF Framework ‘Empowering People to Work’ Lancashire County Council Older People Strategy
Series of workshops/presentations with invited partners	The audience varies and has included the Food and Drink SSPA, NW Regional European Partnership, Age Concern Wirral, Age Concern Blackburn with

Type of activity	Examples of activity
	Darwin AGM, Cheshire and Wirral Area Reference Group, and presentation to RDA Health and Social Care sub committee
Networking with different agencies at workshops/events to which 5050vision has been invited	This includes the Lancashire County Council Strategy for Older People, the National JCP Incapacity Benefit Conference, Regional JCP partners consultation events, 'Adding Value through the Customer Experience' (the Call NW Contact Centres Annual Conference), 'Take off for Success' Skills for Health Conference (joint workshop session with TAEN).
The establishment of Task Groups	The Older Workers Task Group and the Mid Life and Older Persons Health Task Group

6.7.1 We are in little doubt that these activities are resource-intensive (in terms of time). Owing to this, 5050vision have confirmed to us that they judge where we go and what to invest their time in - and the degree of influence is generally the key determinant in this process.

7 Building on a successful partnership

7.1 Introduction

7.1.1 This section of the evaluation draws the main findings together and sets out a rationale for 5050visions continued existence and what lessons have been learned by the partnership to date. It also includes examples of other regional approaches.

7.2 Lessons learned

7.2.1 Without doubt 5050vision is a credible partnership and one that has an overwhelming amount of support from the organisations consulted during the evaluation study. Despite its relative infancy, we are pleased to report an organisation that has evolved, matured and achieved a considerable amount in a short period of time. There are numerous plaudits for the partnership and it would appear to be in a credible position from which it can develop. To build on the successes, we suggest that attention is paid to the following “lessons”:

- **Focus is key:** all of our consultees have confirmed that the credibility of the partnership improved when it began to “sharpen” its focus via the current business plan. Our own review of the main documentation would confirm this also and the shift in emphasis in key documentation is evidence of an organisation “getting to grips with” its area of focus and priority. The same commitment to focus should be honoured in future iterations of the business plan. In considering this, a clear delineation should be made between issues that are inherently strategic and objective-orientated and those that are action-orientated. The adoption of SMART objectives should be encouraged.
- **Continue to target those organisations where there is scope for influence:** 5050vision has proven itself able to add considerable value to organisations that are affected by the issue of ageing but for which it is not the main focus of their work. Examples here include those for whom the partnership has run workshops, or how have been targeted for conferences. They include SSCs, SSPAs, ACAS, Enterprise Agencies, Colleges, Business Associations, CBI, NHS managers and HR Directors, SRPs, LAs, CCs, Business Links and many more. The future ability of the partnership to bring new perspectives, new information and new opportunities to these organisation is a real asset and one that the organisation should continue to leverage. The future focus should remain on “preaching to the unconverted” and the partnership should not be allowed to become distracted from this in any event.
- **Reliance on key individuals:** credit is clearly due to the two part time members of staff that service the partnership. Both of these individuals – the chief officer in particular – have received consistent positive feedback from our consultees. Whilst this should be seen as a “good thing” it creates an inherent level of vulnerability within the partnership. The Executive Committee and indeed broader partnership need to consider this vulnerability when making decisions about the future direction of the partnership.

7.3 Learning from elsewhere

7.3.1 Here we provide a brief overview of two other regional forums on ageing in the East of England and Yorkshire & Humber.

Future East – East of England

- 7.3.2 Future East is the Regional Ageing Forum for the East of England. The forum was established in 2004. It comprises individuals, organisations and businesses with an interest in ageing issues, or for whom demographic change over the coming years will bring both challenges and opportunities. Future East is supported by a strong partnership of organisations, including the East of England Regional Assembly and the East of England Development Agency and leading voluntary sector agencies.
- 7.3.3 The aim of Future East is to enable a strategic and joined-up approach to promoting and implementing change. Emerging from the concept of a “Regional Forum on Ageing”, its aim is not to develop a discussion forum, or a network purely for the sake of networking.
- 7.3.4 The focus of the initiative is strategic, to provide a process to bring regional players together for action and to develop a mechanism for coordinated activity across the region. The work programme of Future East will primarily be carried out through 8 Working Groups, namely health and social care, digital inclusion, work and learning, housing and planning, finance and benefits, access, mobility and transport, leisure, sport and culture, and inclusive design.

Future Years – Yorkshire and Humber

- 7.3.5 Future Years is Yorkshire & Humber’s Forum on Ageing. It began in 2001 as a network of organisations working together to look at the demographic change issues in the region. The forum operates from a small executive consisting of statutory regional bodies, older people’s organisations, voluntary organisations and universities.
- 7.3.6 The aim of the Forum is to act as a forum for highlighting and responding effectively to the key issues arising from the ageing population of the Yorkshire and Humber region.
- 7.3.7 In 2002, the Forum worked with Sheffield University to produce a publication for older people within the region. It examines the issues of demographic change and the economic and social impacts. This document started the debate about the impact of the ageing population.
- 7.3.8 The work of the Future Years is primarily carried out through the Executive and Working Groups. The key work priorities are age management strategies, health, education, carers, social economy, employers across the region and any additional research needed. The Forum also runs a range of activities, events and forums.

7.4 Statement of continued need

- 7.4.1 It will come as little surprise to anyone that such a positive evaluation concludes that there is a continued role for 5050vision. However, “positivity” is not the only driving factor here. 5050vision is *the regional* focal point for ageing and demographic change issues. Through their work, the issue of ageing and the statistical evidence of demographic change have been brought to the attention of key partners and organisations across the region.
- 7.4.2 In the North West *no other organisation* is solely focussed on the issues of ageing. 5050vision has been able to bring organisations together, influence them and essentially fill the gap in people’s awareness, understanding and knowledge of ageing. Without them there would be a void in knowledge and limited interaction between these organisations on the subject of demographic change.
- 7.4.3 However, despite all the good work done to date by 5050vision there is still a long way to go to bridge the gap between the main players, and the wider audience. As the evaluation

has demonstrated the ageing agenda is on the radar of many organisations but all of the evidence indicates what is required is a continued “joined up” approach to strategy and delivery. 5050vision plays a role – and should be actively encouraged to continue to play a role – in providing the “glue” between a wide range of complex organisations and structures.

- 7.4.4 The evaluation has demonstrated that many of the stakeholders firmly believe this is best achieved by one organisation – with a prime focus on ageing. There is a sense that if the ageing agenda was incorporated in another organisation with a million and one objectives the focus and momentum would be lost.
- 7.4.5 At a strategic level there is a need to alter employer and employee perceptions and policies on the older worker. 5050vision is very alert to this. Their proposed major NW study on Attitudes and Good Practice in the Employment of Older Workers in SMEs and Micro businesses has been used as the catalyst to bring a range of different stakeholders and partners together as a steering group. The steering group, which has committed itself to action on those outcomes, offers a major opportunity to get the outcomes of the study and the essential messages across to employers. The outcomes should assist with marketing and promoting the age agenda and the issues and opportunities presented by the 50+ population in the region. It is essential that 5050vision, with the help of those key members, including Business Link for example, ensures that this is driven forward and gets on employers “radars”.
- 7.4.6 5050vision essentially acts as a conduit for information on ageing and signposts organisations to relevant contacts/information/resource. This is a good thing and something that needs to continue. Dissemination of information and results is a vital component of what 5050vision does and will be a central necessity if the ageing agenda is to stay on people’s agenda and for the momentum to continue.

8 Recommendations

8.1 Introduction

- 8.1.1 This section provides sets out our recommendations for the NWDA on the ageing agenda. This evaluation – understandably – comes at a point in time where 5050vision are applying for funding from the NWDA. Therefore, it is therefore right for the NWDA to ask for an evaluation and future recommendations for the partnership.

8.2 Overview

Contextual issues

- 8.2.1 Before establishing our recommendations, it is in our view important to establish the context that is likely to surround them. The force with which demographic ageing will be felt in the future is a result of things that happen *here and now*. The economic impact of a population that has proportionately more older people will arise from a complex equation that multiplies those individual people by their level of disposable income, their access to assets and credit, their physical health and capacity etc. Work-life events in the here and now will “later” find some individuals with high retirement incomes, high net worth, good health and considerable human capacity living in more desirable places. At the other extreme, these same sorts of events will see some people on low incomes, with no access to capital and credit, poor health and low capacity living in places with low amenity as they make their way into old age poverty and social exclusion. As Pahl (1999) points out in his contribution to the *Debate of the Age* the over-riding condition is **social exclusion**. Tackling social exclusion in the “now” will have a dramatic effect on the downside results of an ageing population “later”.
- 8.2.2 For those with an interest in competitive regional economies, ageing is a significant issue. Nationally, the older population is growing at a proportionately faster rate than the rest of society. In the North West, currently 34% of the population is aged over 50. By 2024 the forecast is that this will have risen to 40%. The economic impacts of this proportionately growing population will depend significantly on their particular socio-economic characteristics and will have profound effects on both private and public organisations. For the private sector, if the weight of the older population is towards the less well off, there will be potentially substantial impacts on regional demand. Likewise for the public sector, if the balance of the older population is weighted towards the less healthy, there will be considerably growing demands on public services. Of course the hoped for position is that the ageing population is more balanced toward people who, in old age, will be self-sufficient, healthy and able to make a positive contribution to their own and others’ lives.

Towards a policy led position

- 8.2.3 The manner with which the North West responds to these issues today will clearly affect outcomes that occur tomorrow. The region’s current approach is clearly a multi-layered one, with numerous organisations contributing in different ways. Part of the focus of 5050vision is to work amongst these organisations and bring coherence and integration where this is required. In most cases this works well, but a view expressed to us throughout our consultations is that these arrangements could be made to work even more effectively if the region had an agreed *policy position* that reflected where the focus of regional priorities should lie.
- 8.2.4 The rationale for the development of a policy on ageing is a strong one. Not only is it defined by the nature and scale of economic challenges and opportunities that confront the region as a result of its changing demography, it is also linked to a changing European policy context. Demographic change, including ageing, is being seen as one

of the key challenges for European growth, and is likely to become a major focus for future European Commission *activity and funding*. Our earlier analysis outlined how the issue has been identified in a number of European Commission communications, in particular the September 2007 Fourth Report on Economic and Social Cohesion - Growing Regions, Growing Europe. Whilst this is currently undergoing consultation, it is inevitable that its outcomes will set the scene for future European investment. The North West is already actively engaging with this context.

- 8.2.5 The current Regional Economic Strategy sets out a specific action relating to ageing. Action 62 focuses on the *promotion of the benefits of older workers to business and raise awareness of the impact of an ageing workforce and fewer young people*. It has been expressed to us that a future regional policy on ageing could be improved if it fully reflects the *cross cutting* nature of demographic change. At the moment, from a regional economic development standpoint at least, policy on ageing is reflected in a single RES action which does not fully account for the extent to which it is integrated with other important areas of regional policy.
- 8.2.6 A policy position could not only help with the identification of future investment opportunities relating to ageing, it could assist with the future monitoring and evaluation of these (including 5050vision). This evaluation has highlighted the difficulties of measuring the impact of the investments made into 5050vision. Part of the reason for this has been the absence of SMART³ objectives, which of course could be developed as part of a regional policy.
- 8.2.7 The focus of the policy should, in our view, be initially an economic one. This economic focus should however be broad – reflecting on the one hand issues of social, health and economic exclusion whilst on the other, issues of enterprise and business development. The policy should obviously work within the existing regional strategic framework, but should be sufficiently flexible to cope with future changes to this (including future Regional Economic Strategies, the possible Integrated Regional Strategy and a changing European policy context). The policy should seek to build on the lessons learned from other initiatives that adopt a cross cutting approach (for example Women’s Enterprise) and find identify cost effective ways of integrating ageing into existing delivery structures and approaches.
- 8.2.8 Without writing the policy itself, we would suggest that the main themes or areas that should be covered by it include:
- Maximisation of the economic opportunities associated with ageing, including:
 - Entrepreneurship and business start ups and business survival;
 - Increasing economic activity rates amongst the over 50’s;
 - Maximising the skills contribution made by the over 50’s;
 - Exploration and maximisation of business development and innovation opportunities associated with a changing demographic.
 - Minimising the impact of social and economic exclusion effects of ageing, including:
 - Health inequalities;
 - Financial exclusion.

³ SMART refers to objectives that are Specific, Measurable, Action orientated, Realistic and Timetabled.

8.2.9 Of course, 5050vision already has a great level of understanding of these issues and the partnership will have its own views on the content and focus of the strategy. The above points are a “starter” that should be refined and developed through dialogue.

5050vision

8.2.10 5050vision is the North West forum on ageing and obviously plays an important role in influencing policy and decisions that affect the region. This evaluation has discovered a partnership that does these things with credibility and the support of its stakeholders. A continued role for the partnership has been argued as necessary as a conclusion of this evaluation. Learning lessons have also been identified. Amongst these are the need for the partnership to be focused in its work and target its resources at those areas where it can add the most value (often working with organisations and stakeholders who are the “not yet converted”). The adoption of a regional policy will significantly help 5050vision in achieving this focus.

8.2.11 Currently 5050vision is reliant upon funding from the NWDA to continue its current work programme. In is our view that based on the strength of the evaluation, a continued role should be encouraged. That will, of course, require resource and again, in our view resources should be made available, providing that attached to it are the necessary conditions to allow for each of the learning lessons identified at 7.2. We would see no major difficulty in the partnership addressing the first two of these (achieving stronger focus and working with “unconverted” organisation). The final point (staff resource) is slightly more complicated, with the current Chief Officer having made it clear that she will be pursuing new opportunities in the new financial year. Of course, the vacant position can be filled, but this is likely to take time and provision for this must be made now. Any funding agreement must however recognise that the partnership may have its capacity somewhat constrained as part of any interim arrangement.

8.2.12 On the basis of form following function, funding for 5050vision must also recognise that its role and focus may change as a result of the production of a regional policy. Flexibility must then be built into any funding agreement and an acceptance of the need to be flexible must likewise be a feature of 5050vision in the short term. The need for flexibility should be seen by all parties as a positive step. The corollary of an agreed policy position is that the NWDA that it is committing to developing a long term policy for ageing in the region: this is a positive outcome for the partnership.

8.3 Recommendations

8.3.1 It is in the context of the above remarks that we have structured the following recommendations. These are directed at the NWDA as the client to the evaluation. Beyond these, we also make recommendations directed at 5050vision itself, which deal with the immediate issues of funding and the partnership’s measurement of outputs and outcomes.

- Recommendation 1 - The NWDA should initiate the process of developing a policy on ageing for the North West. This should include may of the aspects highlighted earlier and should a document that encourages organisations, especially the RDA itself, to adapt and find new ways of incorporating ageing in its main programmes and other policies.
- Recommendation 2 – interim funding is awarded to 5050vision to cover its operational costs up to the point which its form and function can be reviewed to reflect the new regional policy position.
- Recommendation 3 – any future funding for 5050vision should be awarded on the basis of the partnership having a more developed approach to demonstrating its impact. We emphasise that this is far from a criticism, but rather a recognition of

the innovative nature of the work of the partnership to date and its focus on influencing and adding value. That future approach should recognise the need for:

- SMART objectives – that are focused on the achievement of agreed outcomes specified within the 5050vision business plan
 - A stronger focus on demonstrating contribution to agreed outcomes (many which we have highlighted in this evaluation);
 - Insisting that its partners and members – when making use of the services of the 5050vision team and resources – agree, where possible, specific Key Performance Indicators that allow activities to be linked to outcomes;
 - Joint training sessions between 5050vision and the NWDA evaluation team to develop and agree future evaluation framework measures that build on the findings of this study and other examples of good practice.
-
- Recommendation 4 – related to recommendation 3 then is a requirement at this point to refresh and review the partnership in light of the regional policy. Any changes in the funding and funding structure (if so required) for the partnership will need to be initiated in good time to ensure continuity.
 - Recommendation 5 – The NWDA should disseminate the fact that it is producing a policy on ageing widely within its own corporate structures and this process should be led by senior individuals.
 - Recommendation 6 – The NWDA should promote the positive outcome of this evaluation and highlight the good practice and learning lessons that needs to develop specific activities to achieve the policy.
 - Recommendation 7 – the 5050vision partnership should proactively address any staffing issues associated with the possible departure of existing personnel through recruitment effort that is timed to minimise disruption to the partnership itself.

Appendix A – Consultation list

Consultation List			
Name	Organisation	Name	Organisation
Val Michej	5050vision	Andy Finnie	TAEN
Pauline Walsh	Age Concern	Rob Vondy	ACAS
Peter Hart	NWRA	Jayne Thomas	Pathways Programme East Lancashire
Liz North	5050vision	David Eva	Union Learn
Julia Cooper	Voluntary Sector NW	Roger Langford	Chemicals NW
Susan Gillen	Age Concern	David Hickman	Food and Drink
Danila Armstrong	DoH/RegionalPublicHealth/GONW	Karen Couzens	People 1 st
Steve Broomhead	NWDA	Jane Rushton	JCP
John Devine	NW Forum of Faiths	Nick Marcangelo	DoH
Christine Milligan	NWUA	Tom Hennell	GONW
Mike Pearson	Federation of Small Businesses	Fiona Huntington	North Cumbria PCT
Peter Bennie	PRIME	Gill Holmes	Age Concern
Brendan Doyle	NW Regional European Partnership	Alison Hill	NWDA
Evelyn Asante-Mensah	NWDA	Yvonne Sampson	NWDA
Dave Harrison	NWDA	David Slater	Business Link
Viv Gee	NWDA	Rebecca Riley	NWDA
Ron Pelleymounter	NWDA		

Appendix B – Business plan objectives

Key Priorities and Objectives: 06/07-07/08

1. Key Priority – Communication and Promotion: Raise awareness of the opportunities presented by demographic change in the North West amongst key policy and decision makers; ensure that communication from 5050vision is efficient and effective and that the role of 5050vision is recognised and enhanced as a consequence.

Baseline:

It is evident that many employers are not aware of the degree of demographic change taking place either nationally or in the North West, nor clear about the implications of this for future labour market supply. Good communication strategy and promotional activities are key foundation stones for the work of 5050vision.

Objectives:

- ◆ Secure recognition of the role of 5050vision in the NW through the active development of personal contacts and relationships with organisations with complementary interests
- ◆ Ensure communication channels are effective and in particular that the website is developed to simplify and enable communication with and between interested parties, sharing of good practice, access to papers etc
- ◆ Increase the practical engagement of Executive Group partners and ensure that the membership either reflects, or can create access to, the range of interests and perspectives necessary to support effective debate and action
- ◆ Monitor the partnership agreements established with members of the Forum which identify and align member organisation objectives and the collective objectives of 5050vision, creating clear action plans for individual members
- ◆ Explore the potential use of major regional (or national) and local events to position 5050vision or to further its agenda or sphere of influence on policy and decision makers
- ◆ Produce a North West regional 5050conference with PRIME, Age Concern, regional Chambers of Commerce (and other agreed partners) with specific theme of Enterprise in 2006
- ◆ Continue targeted conferences, workshops or events aimed at specific sectors or segments
- ◆ Seek opportunities for utilisation of the Regions for All Age Proofing toolkit
- ◆ Promote awareness of demographic change in the North West and an understanding of the action necessary to respond to the opportunities presented to:
 - Employers
 - Intermediary bodies and non-statutory committees

- Skills providers and associated funding agencies

- Enterprise, business and or social, silver entrepreneurs as a contributor to economic growth

And the contribution that action would make to:

- ◆ Maintain healthy ageing and a reduction in Health Inequalities

2. Key Priority – Policy Development and Influence: Ensure that the key policies and decisions taken by public private and voluntary sector organisations in the North West, notably employers and funding organisations, recognise and respond to the consequences of demographic change and that strategies are sensitised to the opportunities and needs of the over 50s.

Baseline:

Building on the previous priority, of good communication and promotional activity to raise awareness, 5050vision aims to catalyse action amongst relevant policy and decision-making channels in the North West, in the context of the priorities in the Business Plan. Evidence of success would be if these issues were evident and action was embedded in the strategies and plans of public private and voluntary sector organisations and discrimination did not disadvantage this group. However this long term attitudinal change is likely to take longer than the 2 year period of the Plan. The opportunities presented by the over 50s and responses by employers, providers, investors and others need to be mainstreamed as part of what they do naturally and the need to categorise or label this particular age group, to secure attention and action, should then gradually diminish.

This priority of reaching key people and key organisations, making connections over respective agendas and persuading others that, to hit the over 50s agenda, will sometimes only require minor adjustments to what they were intending to do anyway, is crucial to the role of 5050vision.

The significance of demographic change and the need for a coherent response in the region must form part of the backdrop to the analysis and the responses in the Comprehensive Spending Review, to be undertaken during 2007 (CSR 7)

Objectives:

- ◆ Exercise collective and individual member influence to affect policy development and decision making affecting the over 50s at any level in the North West and beyond
- ◆ Ensure that the agenda of 5050vision is sustainable through commonly understood strategies and policies, through the mainstream activities of partners, and by ensuring that recognition of the over 50s is embedded within, for example, investment strategies

- ◆ Increase the level and spread of understanding about demographic change and ensure that this informs the Comprehensive Spending Review (CSR 7) within the region

- ◆ Ensure that the input, work and influence of the partners in 5050vision both affects and supports the key regional strategies particularly Spatial, Housing and Transport
- ◆ Ensure that the providers of services and support to the over 50s understand that this should enable their continued employment, economic contribution, social inclusion, skills development and optimise their capacity to contribute to work or society
- ◆ Utilise the forthcoming age discrimination legislation as a lever for debate and action
- ◆ Identify and access key policy and decision making forums to catalyse the debate and the development of action plans
- ◆ Achieve recognition of 5050vision as the conduit and first point of contact for the NW for appropriate consultations, expertise, guidance etc
- ◆ Continue to provide input and support for the implementation of the Equality Strategy for the North West including involvement in partner activities and action plans
- ◆ Establish and monitor Partnership agreements (action plans) between 5050vision partnership and individual member organisations to identify and pursue the collective objectives of 5050vision and their organisational objectives
- ◆ Ensure Forum partners and policy makers recognise and engage the key agencies in health and social care appropriately. Ensure that the contribution that the public and independent public health/health and social care sector can make to the health of older people and the Health Inequalities agenda is understood e.g. in terms of employment practice as the biggest UK employer; data, advice and information to other agencies about their own workforce and about healthy ageing and tackling health inequalities etc; helping to direct action etc

3. Key Priority – Employment: Contribute to the achievement of European targets so that 50% of people aged 55-64 remain in employment by 2010; as a designated lead organisation in the Regional Economic Strategy, contribute to the reduction in the economic performance gap in the North West by engaging employers to act in their own interests to retain and secure future labour market supply; ensure that the needs of the over 50s for “quality” jobs is understood in the context of employment practice.

Baseline:

The changing age structure of the population will have implications – with the number of young people and the proportion of the total population who are young both declining. Labour market supply will be commensurately reduced unless older people are retained or attracted back to work as a supply solution. There will be fewer school leavers to take on the

“entry level” and/or lower skilled jobs. These will need to be filled from elsewhere in the potential or future workforce. There will also be fewer university and college leavers, reducing the ability of companies and public sector employers to attract new graduates.

In all sub-regions of the North West proportionally more males are economically active than females after the age of 50 i.e. in employment. For males and females, however, the rate of

participation amongst older people in Greater Merseyside is lower than the four other sub-regions. This would suggest that targeting of older people to re-enter the labour market may need to be concentrated more on Greater Merseyside than elsewhere in order to bring it up to the regional average.

The whole of the North West however needs to be targeted generally to increase participation rates of those aged over 50, for both males and females. Only the North East has lower economic activity rates than the North West for people aged over 50 and the region falls short of the South East by 5 percentage points in terms of female activity and 8 percentage points for males. Information about economic activity amongst the over 50s is set out in the Appendices.

In order to best take advantage of the expanding mid life and older age population, it is essential that participation of older people in employment is increased.

The Government has published its strategy looking at the issues of an ageing population – “Opportunity Age. Meeting the challenges of ageing in the 21st Century” (April 2005, HM Government). This represents the first ever cross-Government strategy looking specifically at the issues facing British society as people live longer, healthier lives. It addresses issues such as enabling people to extend their working life, supporting active ageing in our communities and giving people more choice and independence in how they use the services at their disposal.

One of the key strands within the strategy is the desire to achieve higher employment rates overall and greater flexibility for over-50s in continuing careers, and the role of managing any health conditions and combining work with family and other commitments as a means of achieving this. Its specific aims are:

- ◆ To achieve 80% overall employment rate including a million more older workers nationally
- ◆ To increase the employment rates of people aged 50-69 and to significantly reduce the difference between their employment rate and the overall rate by 2008
- ◆ New pension rules will encourage people to stay in work;
- ◆ The age cap for higher education fee loans will be removed;
- ◆ From May 2006 1.4 million employers will receive information about the clear business case for removing ageism from employment

- ◆ A new skills coaching service will be introduced aimed at those on job seekers allowance and income support;
- ◆ A new Commission for Equality and Human Rights will enforce age legislation in employment and training by October 2006

Objectives:

- ◆ Determine and then deliver specific outputs through the Task Group on Employment issues, to be established March 06
- ◆ Increase knowledge in the community or interests in the North West of the flexible working and other employment practice solutions needed, to support some older people to manage health conditions and combine work with family and other commitments in order to remain in or re-enter the workforce.
- ◆ Promote the benefits of older workers to business and employers and raise awareness of the impact of an ageing population and fewer young people to enter the workforce
- ◆ Influence employers by ensuring that the evidence base of the positive attributes and characteristics of employing older workers is understood and forms the basis for action
- ◆ Working with the NHS as the major employer in the UK, investigate ways of building on existing progress in employment practice to ensure that the opportunities that are presented by the over 50s are not lost in terms of
 - Increasing workforce numbers and capacity
 - Sustainable labour market supply
 - Recruitment and retention strategies
 - Target for professional or level below training
- ◆ Promote action by employers through:
 - Sector Skills and Productivity Alliances (SSPAs) and all constituent organisations
 - Sub Regional Partnerships
 - Chambers of Commerce
 - Targeting major employers/sectors particularly NHS and social care
 - Utilising the leverage of impending age discrimination legislation
 - Identifying other potential levers for action e.g. NHS Improving Working Lives (IWL)

Model Employer standards

- ◆ Consideration of the targets that would be acceptable to measure success
- ◆ Ensure employers recognise the imperatives of the Age Discrimination legislation whilst ensuring that focus is on the sound Business Case for employing older workers
- ◆ Support the SSPA Image and Recruitment group and its focus on older workers

- ◆ Influence the activities of the Sub Regional Partnerships
 - ◆ Ensure a strong focus on the quality of work i.e. opportunities that use skills and prior experience and opportunities for progression, as well as opportunities for unskilled and routine work
 - ◆ Work with stakeholder organisations such as The Age and Employment Network (TAEN) to add value to each others agenda and seek opportunities for joint ventures where appropriate
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- ◆ Develop relationships with additional stakeholders
 - ◆ Ensure that Pathways to Work and similar projects, for example under the Northern Way initiatives, recognise the potential target market of the over 50s and the particular barriers to employment experienced by this group
 - ◆ Participate in European initiatives as appropriate, sharing good practice and promoting the role and approach of the NW Regional Forum within Europe

4. Key Priority – Skills Development: Ensure that employers and intermediary bodies, understand the requirement to invest in the continued training and development of older workers; ensure that the priorities for regional skills development reflect the needs of current and future older workers including those who are presently workless; that Information Communication and Technology (ICT) skills in particular for this target group are recognised and provided for in appropriate ways; that the needs of potential silver entrepreneurs are appropriately supported whether in business or social enterprise.

Baseline:

There will be a 12% decline in the number of young people in the North West over the next 10 years compared to 7% in England. The potential workforce of the future will therefore be made up of more, older people and fewer younger people and this has implications for skills development priorities and investment.

Currently, the statement of skills priorities for the North West gives slight recognition of the needs of older workers but this clearly needs translation into action not only within the organizations that constitute the employment and skills sectors but into investment strategy within regional and other key agencies e.g. Learning and Skills Councils (LSCs).

Information, Communication and Technology (ICT or IT) skills remain a particular barrier to inclusion or economic activity amongst the over 50s.

Employers are less likely to train staff than elsewhere in the UK and there is evidence of lower levels of entrepreneurial skills and poorer management skills than the England

average. There are 120,000 more people with no qualifications compared to the England average and 50% of that figure is in Liverpool and Manchester.

Objectives:

- ◆ Seek to reverse the current decline in the numbers of adults in their 40s, 50s and 60s taking part in training and re-skilling, particularly to support change and transition in mid and later career

- ◆ Ensure that Regional Skills Partnership priorities reflect the needs of older workers and that the activities of 5050vision are consistent with supporting and enabling this objective
- ◆ Influence the work of the Sector Skills and Productivity Alliances (SSPAs) so that the collective voice of employers in the 25 sectors properly reflects the needs of a more diverse workforce than in the past
- ◆ Work with the SSPA Image and Recruitment Group to lead and support their developing action plans where relevant
- ◆ Ensure that the emergent Sector Skills Agreements identify collective objectives and that employers are engaged at an early stage. Support the SSPAs agenda and engagement with Sector Skills Councils and in particular the pathfinder agreements
- ◆ Influence the policies and investment strategy of Learning and Skills Councils, Sector Skills Councils and other key agencies
- ◆ Establish ICT skills as major priority for development and/or investment by employers and funding agencies, working with e-skills and ITQ, to support retention and recruitment of older people
- ◆ Establish clear understanding of the role of ICT skills amongst older people to combine skills for employment with skills for life and citizenship to support the delivery of productivity gains from e- services, particularly by public agencies
- ◆ Provide targeted presentations or events as appropriate within the various sectors to stimulate debate and action

5. Key Priority – Business and Social Enterprise: Increase awareness of the potential of enterprise development, including social enterprise and self employment, as enabling factors for older people to remain economically active, to maintain their independence and play an active role in society.

Significant baseline information has been set out under the key priority of Employment above, which is also relevant to this Enterprise priority. Currently, only 68% of those aged 50/64 in the North West are economically active.

Responses to a biennial membership survey of 165,000 small businesses in the UK undertaken by the Federation of Small Businesses in 2004, and reported in “Lifting the Barriers to Growth”, shows that over 60% are owned by people over 45. The greatest percentage ownership was amongst the over 55s. This amply demonstrates the abilities of this age cohort to succeed and sustain small businesses. They are making a significant contribution to the economy already and the potential of this age group for future start ups needs to be recognised as a largely untapped and unsupported target market.

In this priority area of our activities, 5050vision is not intending to influence the development of existing businesses but to encourage entrepreneurialism.

Baseline:

Successful economies are generally associated with above average rates of business start-ups. However, the region tends to have less owner-managed businesses with a substantial ‘enterprise gap’ of around 20% fewer businesses per head and new start-ups compared to the England average. The North West would need around another 38,000 businesses to mirror national levels. In addition to a low business birth rate, low overall business stock, survival rates for new businesses are also low, with evidence of less entrepreneurial attitudes.

The North West starts from a low business base: the region’s stock of VAT registered business per 10,000 adults is 18% below the England average and only the North East has a lower density of businesses. The North West start up rate per 10,000 adults is 17% below the English average in 2003, making it the third worst performing region in England and hence contributing to the gap in the total stock of businesses. To compound the low levels of existing and new businesses, those that are established tend not to be as durable as those in other regions. The three-year survival rate of new businesses in the North West between 1999 and 2002 is slightly below the national average (63.6% compared to 65.9%), making the North West the second worst performing region, (behind London which has a much larger formation rate as a cushion).

Whilst there is some evidence that the North West is slowly beginning to make up ground on the England average, there is no scope for complacency. Were the North West to maintain its 2003 growth rate in total business stock, it would still take the region until nearly 2020 to hit the current national average for net registrations per 10,000 registered businesses.

Many businesses set up by older people are based on personal interests or hobbies, so-called 'lifestyle' businesses, and may appear to contribute little of real value to the economy. However, the spirit of enterprise from which they emerge is a key indicator of the vitality, buoyancy and confidence in local markets and communities. New entrants mean greater competition for existing suppliers and greater momentum in the cycle of innovation which leads to new ideas, products, services and processes.

Enterprise also varies greatly by area within the region. The business start-up rate per 10,000 adults varies from 3% below the England average (Cheshire and Warrington) to 38% below in Greater Merseyside. Work underpinning the RES suggests that the enterprise gap of 38,000 businesses is concentrated in Greater Merseyside and to a lesser degree Greater Manchester.

Older people are already significant in terms of self-employment, with the highest rates of self-employment amongst those aged 55-59. The North-West deficit in numbers of self-employed can be attributed to key age groups. It is those age groups with the higher rates of self-employment (broadly 35 to 69 year olds) where the region experiences the greatest deficit. Much depends therefore on decisions about retirement amongst those approaching 55 to 60.

In 2003/4 economic activity rates for older workers in the North West stood at 68.4% for those aged between 50 and retirement age, compared with 76.5% for all people of working age, and 7.6% for people aged over retirement age. For both older age groups only one English region has a lower participation rate than the North West (the North East in both cases). This suggests that the North West currently is not utilising its older population to the best of their abilities, but also that it is the region with most to gain from policies to increase economic activity rates for older people.

Encouraging more older people to enter or re-enter the workforce represents one solution but for many people aged 50+ self-employment can address some of the constraints which may prevent them from seeking employment, e.g. many have caring responsibilities to their partner, elderly relatives, friends or grandchildren which would make it difficult for them to commit to 'normal' working hours for an employer. Working for themselves in certain business areas can allow flexibility to earn an income and continue to meet commitments. People with health issues may also benefit from increased flexibility in working arrangements through with self-employment.

The cost of living continues to rise for all groups in society, but state pensions, since they are not linked to the rise in earnings levels, do not rise at a similar rate. This can lead to financial pressures on older people (especially those past official retirement age) forcing them to remain in the labour force for longer than they would wish to, whereas self-employment based on development of an existing hobby or interest may be a more palatable option.

Sickness and disability as a cause of inactivity within the region affects 8.9% of the working age population compared to 5.9% for England as a whole. The region now accounts for 20% of Incapacity Benefit claimants in England (compared to 13.6% of its population) and has the largest number of any region (around 400,000 or 9% of the working age population – the

second largest region, London, has only 280,000). Of this total, 50% are aged 50 plus or 217,960 people. The male economic inactivity rate has also been increasing in recent years in the North West, particularly amongst older males. Older people in the region, are, however, also entrepreneurial and innovative, and increasingly so. In 1995 the prime age for starting a business was 25 to 34, however, by 2003 had risen to 35 to 44.

Issues of social exclusion, worklessness and poor skills are highly linked together and mutually driven. They are also highly concentrated in areas of deprivation. Out of the gap of 80,000 fewer people not in employment compared to the England average around 70,000 is accounted for by just six local authority areas. The economically inactive are spread across the region, but concentrated predominantly within Liverpool, Manchester, Knowsley, Halton, Salford and Barrow with some significant concentrations outside of these districts for example St Helens, Sefton, Wirral, Oldham, Rochdale, Bolton, Wigan and Blackpool.

Although deprivation is often masked in the official statistics for rural communities, it is also a major issue in many of these areas. The region's rural areas have significant concentrations of both prosperity and deprivation, often existing 'cheek by jowl'. In parts of the region, residents who live in rural areas and commute to work in urban areas tend to push up measures such as Learning and skills. However, the wage rates and incomes of those relying on rural employment are often poor.

The fact that it occurs in smaller 'pockets' raises issues around the ability to target assistance effectively upon those who most need it.

Self-employment is an important part of the region's rural economy. The proportion of the workforce who are self-employed is higher here than in urban areas. The extent of self-employment also increases the more sparsely populated the area. The population base of the rural North West has an older age structure, the average age of which is increasing. The trend is more pronounced in remoter rural areas, where access to work is a constraint.

Nevertheless, the picture is mixed and there remain some significant challenges for the region's rural areas, including the need to diversify and strengthen the business base of the more vulnerable parts of the rural economy:

Objectives:

- ◆ Encourage higher levels of enterprise, including social enterprise and self-employment among those aged 50+ in the NW, in order to support an overall increase in economic activity rates for older people and reduce the 'enterprise gap' and employment levels generally
- ◆ Promote awareness of silver entrepreneurship among strategic regional partners and stakeholders, including Local Authorities to support their lead role in planning for the ageing of their communities
- ◆ Contribute to an increase in the overall employment rate for those aged 50+ to 80%

- ◆ Work with Local Authorities and Government Office -NW to explore the potential for Local Authority Agreements (LAAs) to have a specific and appropriate focus on enterprise in terms of achievement of their key outcomes for regeneration in deprived areas and to address issues of poverty and deprivation among older people
 - ◆ Encourage and support the silver economy and the potential entrepreneurialism of the over 50s by exploiting links and working with organisations or agencies active in enterprise support
 - ◆ Determine the current evidence base for entrepreneurial activity amongst the over 50s in micro and SMEs and the factors which might determine successful ventures. If necessary, consider commissioning relevant research with the support of partners
 - ◆ Support partners in determining where their intervention, support and action would be most appropriate and effective with this age cohort
 - ◆ Develop appropriate indicators to measure progress
 - ◆ Participate in the proposed social inclusion enterprise team within the RDA to ensure that age diversity is considered in the development of enterprise strategy and action plans and support the work of the enterprise team across the disadvantaged groups
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- ◆ Ensure that enterprise strategy, priorities and investment reflect the needs of the client group
 - ◆ Organise a NW Conference in 2006 with PRIME and other partners with Enterprise as the single theme
 - ◆ Support the regional targets around women entrepreneurs with appropriate activity linked to 5050vision

6. Key Priority – Health Inequalities: Use data and information from the new report on Health Inequalities in the North West “Where Wealth Means Health” (published Dec 05) and key policy documents, to determine the best contribution that a Health Task Group of 5050vision, operating jointly with Regional Public Health partners and other stakeholders, can make to the reduction of health inequalities experienced by the over 50s. Contribute to the reduction in health inequalities for this age group through enhanced employment opportunity and provision of skills development to support those opportunities.

Baseline:

A new report on health inequalities in the NW “Where Wealth Means Health” was produced in December 05. Based on the two key indicators, life expectancy and infant mortality, the latest figures for England show that the health gap is still widening between the better off and more deprived groups in the population. The North West is one of the most deprived regions

of England and continues to fare poorly with regard to health and health inequalities. The full report is available to download at www.nwpho.org.uk/inequalities.

There is a powerful relationship between the gap in life expectancy and local measures of deprivation. Acting on some of the wider determinants of health, such as availability of employment to help alleviate poverty and skills development to enable employability and participation in society, is crucial to reducing the numbers of people living in deprivation and to reduce the health gap.

This thinking has been integral to our choice of priorities and the reason why tackling Health Inequalities has emerged as one of them. We have already brought together a Health Task Group of interested public health professionals and others and the challenge will be for that group to help take forward and translate some of the data and information in the new Inequalities report for the North West, and other national policy initiatives, into action, to improve the future health experience of the over 50s.

Objectives:

- ◆ Refine the role of the Health Task Group for Mid Life and Older People with appropriate Terms of Reference and membership utilising data from the regional Health Inequalities
- ◆ Report (Dec 05) and the recently published White Paper, “Our Health, Our Care, Our Say” and other key policy documents as the basis for their work
- ◆ Ensure the engagement of the NHS, local government and other key agencies in developing the group and its role
- ◆ Ensure that the outcomes and outputs expected of the Health Task Group are clearly defined
- ◆ Support the work of the Task Group
- ◆ Ensure connections in taking outputs/outcomes or further work forward with existing partnerships or forums as well as statutory agencies for example with Strategic Health Authorities and Local Authorities; or existing Regional Task Forces, for example physical activity, diet, black and minority ethnic groups.

7. Key Priority – Financial Viability: Consolidate the core funding agreed with the agencies for the two year period to underpin the achievement of the priorities and objectives set out in the Business Plan; ensure any plans beyond this period have a sound and agreed investment plan in their support; seek other opportunities for project funding for partners to support the work of 5050vision as appropriate.

Baseline:

5050vision has experienced financial uncertainty but the core funding for 06/08 has been secured through the key agencies of the RDA, NWRA, NHS/DoH and Age Concern. A key purpose of the Plan is to establish clear objectives for 5050vision with the input of partners and stakeholders, to ensure that plans and activities are aligned and adding value. As part of these objectives and joint activities it will be appropriate to explore the opportunities for further funding for example to support particular projects or research. In the longer term, investment plans will need to be developed to support any proposals for the continued work of 5050vision, in any form, beyond this business planning period.

Objectives:

- ◆ Consolidate partner contributions for 06/07 and 07/08 to support all infrastructure costs of 5050vision and the operation of the partnership
- ◆ Establish clear budget and expenditure plans 06/07 and 07/08
- ◆ Establish clear budgetary management arrangements
- ◆ Seek partnership funding and/or innovative sources of finance to support agreed work priorities and to ensure progress with the agenda of 5050vision is maintained and developed
- ◆ Develop clear proposals and model for the future operation of 5050vision beyond 2008 or an appropriate exit strategy

Appendix C – Key partners

Key partners	
5050vision	NWDA
Age Concern Support Services (NW)	ACAS
North West Regional Assembly	EMBF
Voluntary Sector NW	Pathways Programme East Lancashire
Department for Health/Regional Public Health/GONW	Union Learn
North West Forum of Faiths	SSCs
North West Universities Association	JCP
Chamber of Commerce	North Cumbria PCT
Federation of Small Businesses	Business Link
PRIME	NWRIU
North West Regional European Partnership	TAEN
Age Concern	GONW
DoH	
Source: 5050vision	

