

## Information and Advice – focusing on the detail

Information and advice (I&A) designed to empower older people to articulate their housing, care and support needs and aspirations, and to explore ways of meeting them, is central to the Taskforce's deliberations.

*I&A is sometimes referred to as IAG (Information, Advice and Guidance). The I&A services I'm referring to are frequently short-handed to 'housing options advice services' or simply 'housing options services' – to emphasise their focus on living safely and well at home.*

FirstStop Advice was an initiative developed between 2005 and 2008 by a number of leading I&A providers and campaigners, and subsequently supported financially by Government from 2009 to 2016. Founder members were Help the Aged (now Age UK), Counsel & Care (now Independent Age), Nursing Home Fees Agency (now defunct) and EAC.

*FirstStop initially presented its focus as spanning housing, care, finance and rights, subsequently shortened to housing, care and related finance.*

FirstStop is referred to frequently in literature reviewed by the Taskforce – including strong recommendations in a DCLG Select Committee report of 2018 that FirstStop should be re-funded, and in successive reports by the APPG on Housing and Care for Older people calling for FirstStop to provide the model for future delivery of housing and care advice to older people and their families.

This presentation recaps on the research and thinking which led to the FirstStop vision, how this translated into a service specification and delivery model, what was achieved over 7 years and what did not work as hoped.

I hope this will be helpful to the Taskforce as we develop a contemporary vision for the future of information and advice to older people around housing and care options.

### **FirstStop vision**

- A universal housing and care options I&A offer to older people, specified in detail, and aiming to empower users to achieve outcomes they want
- Fully independent and impartial
- Delivered by harnessing the knowledge, competencies and strengths of existing statutory, voluntary and private I&A providers, local and national, in a voluntary partnership
- Promoted widely through housing, care and health authorities, voluntary organisations of all kinds, as well as directly to the public through press & media and outreach events

### Requirements of FirstStop service delivery partners

- Evidenced strengths / competencies to deliver to FirstStop service spec
- A 'no wrong door' commitment ("access the whole FirstStop offer via us, even if we ourselves only deliver part of it")
- Sign-up to a FirstStop quality assurance framework
- Acceptance of joint service branding with FirstStop
- Acceptance of independent evaluation of contribution to FirstStop service delivery

### FirstStop national service offer

- A dedicated national website to promote national and local services and to house resources for local advisors and the public alike
- A dedicated national advice line, fronted by EAC and including phone, mail, email and live chat, and with a co-production approach to exploring solutions, if required
- Key information resources, for use by all partners – directories of accommodation and services (identifying those for or of particular interest to ethnic and other minorities), factsheets, explanatory materials and guides
- Development of I&A tools to be shared with FirstStop partners – localised HOOP tools, user ratings of housing facilities, comprehensive reference library, etc.
- Recruitment of specialist I&A (and some other) resources into FirstStop partnership – SOLLA membership (financial advice), Solicitors for the Elderly, Beacon (Continuing Care advice), Seamless Relocation, etc.
- An ongoing Advisor training programme and separate dedicated training programme for SOLLA members
- Quarterly meetings /conferences for all FirstStop partners
- Customer referrals across whole FirstStop network to deliver best customer service
- A fulfillment service to deliver bespoke options reports and other I&A materials to customers in print or electronically
- A customer management (CRM) system for case management and reporting, with option for network members to use live, or to bulk upload into
- Data protection policies & procedures
- Service marketing and relationship building throughout the broader network of I&A services used by older and/or disabled people
- Supply of locally branded marketing materials to FirstStop partners
- Commissioning and managing regular independent evaluations of both national and local services
- Regular reporting to funders (DCLG, DH, Big Lottery, N ationwide)

### Seed funding for local housing and care options services

- Managed jointly by Care & Repair England (C&RE) and EAC, with Advisory Group of Age UK, Foundations and Independent Age, to distribute DCLG grant funding for new or expanded local housing and care options I&A services

### Engagement with, training and employing older people

- A series of initiatives, led and resourced by C&RE, each dedicated to helping older people, particularly lower income home owners, find solutions to their housing issues, share solutions with their peers and influence policy development. Important projects include: *If only I had known*, *Passing it on*, *Silverlinks* and *Live Safely and Well at Home*.

### A campaign platform

- C&RE's *Live Safely and Well at Home* also provided a peg to help secure 4 years of funding from Nationwide to provide small grants to dozens of local organisations and older people's groups to promote FirstStop at hundreds of local events across England

### **FirstStop successes**

- c.130 local authorities plus many information services, housing providers and others signposting to FirstStop via their websites, literature and advice services
- High FirstStop website visitor numbers (c.180k pa) – alongside 3.5m to EAC's parallel public facing site HousingCare.org
- National and local advice lines operating at full capacity of 40k customers pa (18k pa national, 22k pa locals)
- Most local partners happy to joint brand their services with FirstStop
- Persuasive independent evaluation evidence of customer outcomes for local face-to-face services (less persuasive for telephone and web delivered services)
- All funder delivery targets exceeded
- Training, support and network meetings /conferences valued highly by local partner staff and volunteers
- Expertise gained from running seed-funded local services generally retained within funded agencies
- The FirstStop model of collaboration between agencies was adopted from around 2012 in the emergence of local First Contact services designed to reach vulnerable and isolated people, and support them by drawing on the collective expertise of local statutory and voluntary services. EAC research in 2013-14 with the Age Action Alliance identified 33 schemes, and offered them access to FirstStop's network of I&A services.

## **FirstStop disappointments**

- Failure to achieve widespread brand recognition by the public – caution about over-exposure (as below) played a part, as did our model of FirstStop as a professional rather than a public brand
- Early need to restrict marketing / customer finding for both national and local services once capacity reached
- A low level of signposting to SOLLA members for independent financial advice was probably a symptom of the fact that most looked for customers for products they understood at the time – mainly to help pay for care
- Case recording requirements required by funders were seen as onerous by some local partners
- Evaluation of outcomes for customers who required only brief I&A sessions proved difficult
- Winding down demand for the FirstStop national service from 2016 was difficult, slow to achieve and put extreme pressure on remaining Advisors

## **Thinking about current and future housing and care options I&A provision**

EAC's sampling of current provision of housing and care options I&A exposes:

- Public sector: A few strong local examples, but threadbare and/or very selectively targeted services in many authority areas of England.
- Voluntary sector: Major national providers, including leaders Age UK and Independent Age, feel unable to commit to delivery at scale without specific funding, in the context of competing priorities post Covid. EAC likewise continues to maintain its information databases and HousingCare website, but has closed its Advice Line. A handful of surviving local services by Age UKs and Home Improvement Agencies continue, but there are few signs of growth in numbers or capacity.
- Private sector: Slowly growing, but current customer numbers not known; generally focused on specific market solutions (a care home, home care or retirement apartment) with income from a mix of pre-planned or metered charges to customers and introducer fees from housing and/or service providers.

Local support for home improvements could be improved substantially if Ageing Better's recommendation for a Good Home Agency network come to fruition, and it is possible to envisage a housing options I&A service bolted on to their offer, at least to vulnerable households.

But we should note that the Good Home Agency concept is predicated on a strong central resource: *"Nationally, it would be a strategic enabler with a statutory responsibility for improving the overall quality and energy efficiency of our homes. It would develop a trusted national brand that would be used for local delivery, the second level"*.

I suggest that a similar division of responsibilities between national and local would be generally supported as a way of expediting the expansion of the good housing options I&A we want to see, and of avoiding duplication, containing costs, ensuring an acceptable minimum level and standard of service in all areas, and of quickly achieving visibility and recognition for the new service and brand.

Subject to this analysis and proposal being tested with LAs and found acceptable, I suggest that we, the Taskforce alongside experienced I&A providers and a panel of LA representatives, should lead by articulating a vision for the future and drawing up a detailed plan for a national service. The FirstStop checklist provides a starting point for specifying the infrastructure requirements (see [FirstStop national service offer](#) on page 2 above).

In parallel we obviously need to think about funding as well as the ownership of a new service:

### **Funding for a new service**

We expect that Government will help expedite work on a new national service by providing some initial funding, but acknowledge that it is unlikely to offer sufficient guarantees to future-proof the initiative. The whole TF could helpfully come together to pool thoughts on this, but my own initial suggestions include:

#### Local Authorities

Some enterprising LAs are already commissioning housing options I&A for older residents from external sources. The TF's Places workstream could help us establish the current extent of this, and what scope exists for a new national I&A service to devise its own charged service offer to LAs allowing them, as customers, considerable scope to co-design the local service element with the national service provider.

#### Larger providers of housing and services to older people

I think nowadays most would support a fully independent and impartial housing and care options I&A service because of the medium term benefits to them of better informed and educated consumers, and specifically the role the new service could play in promoting the enhanced consumer safeguards we hope will emerge from the TF's work.

#### Exploiting consumer data gathered by the service

As I've floated elsewhere, we should explore how a new I&A service should be constructed so that its (anonymised) large scale customer data could feed into an ongoing research / market intelligence function to improve our understanding of 'what older people want'. The TF's Product and Place groups, and Government, might usefully come together to explore this, including its potential to generate income to support the service.

#### Welcoming private sector I&A providers

Could the private sector be woven into service delivery? I suggest it should

be, and probably must be, to bring expertise and delivery capacity that a new service might otherwise struggle to recruit. But also to provide ideas, challenge and stimulus, catalyse fresh thinking and help reinforce a customer orientated ethos within the service. And perhaps to provide optional bolt-on charged services to customers, which the statutory and voluntary sectors have less experience of or appetite to provide.

### **Ownership and structure of a new service**

One option is to re-shape EAC, a registered charity with a very specific and relevant mission (*to help older people make informed choices about meeting their housing and care needs*), and a strong track record in the field, as the custodian of the new service – with an expanded Board of Trustees and new staffing structure.

There are other options of course, and I suggest that starting to explore these early on will helpfully play into our thinking about the extent of the role we want the new service to play, and whether as a stand-alone service or integrated with other related services to older people.

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