

A guide to co-production with older people



Personalisation
- don't just do it -
co-produce it and live it!

This guide has been co-produced by a small team of people working together over a period of four months to capture what ‘co-production’ means and how we’ll know it’s happening with older people who need support in their lives. The team included older people, strategic leads/senior managers in three local authorities and representatives from HSA and NDTi. The team were: Andrew Archibald, Dorset County Council, Sylvia Barker, Dorset POPP Local Evaluator, John Barry, Older People’s Council, Brighton and Hove, Frank Burgin, Arena, Barnsley, Betty Davis, 60+ Action Group, Brighton and Hove, Dennis Milburn, Barnsley Metropolitan Borough Council, Ann Macfarlane, Independent Advisor on Disability Rights, Paul Martin, Brighton and Hove City Council, Sarah Morris, NDTi.

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Older people's definition of co-production

Local authorities, older people and older people's organisations working together to design and deliver opportunities, support and services that improve wellbeing and quality of life.

Co-production is a simple idea: it's about individuals, communities and organisations having the skills, knowledge and ability to work together, create opportunities and solve problems.

Putting this into practice is not so simple, and for older people who need support in their lives is a relatively new phenomenon. These skills and abilities may not always immediately apparent, and it can take time to build confidence, trust and mutual understanding (all prerequisites for co-production). Decisions about public services and opportunities have historically been made by public bodies and agencies without the involvement of local communities and users of those services.

This short guide summarises the key messages from a co-production team who worked together to identify what co-production with older people means, what it involves, and what it looks and feels like when it really happens at a local level. The group identified seven key principles which are described in this booklet. It has been designed to help local authorities to transform the way opportunities, support and services are planned, delivered and monitored through working in partnership with older people at a local level.

To help authorities to understand the power of co-production, this guide contains stories that describe how individuals and communities have worked in partnership with public services to co-produce services and change lives. The stories illustrate how co-production releases the knowledge and skills of individuals for the benefit of the community; how it can reconnect individuals to their communities; and connect local authorities to the people that they serve.

These messages about co-producing services and support with older people are intended for a number of audiences.

Principle 1 - Older people are involved throughout the process - from the beginning to the end.



4 Personalisation - don't just do it - co-produce it and live it!

The first audience is local authorities who have a duty to promote the wellbeing of their communities and to deliver a range of services, including social care. The resource pack contains practical tools to help local authorities to co-produce, and the message for them is simple:

Co-produce your services and you will personalise them.

The second audience is older people and older people's groups and forums. The assumption is that all older people want to stay in control of their lives and that many older people believe that they can and should contribute to the wellbeing of others. The pack gives older people the same information that local authorities are getting. It suggests what older people might expect from local authorities and the reasonable demands they can make on them if they want to get involved in decisions about the policies and services that affect them and the community in which they live. The message to older people is simple:

Get involved and make a difference.

The third audience is older people's organisations. The assumption is that they are committed to strengthening older people's voices in their own organisations, to enable them to help formulate policy, influence priorities and develop services. This pack will also help older people's organisations support local authorities to achieve transformation through co-production. The message to older people's organisations is therefore:

Connect with your constituency, work with your local authority, and commit your organisation to co-production.

Co-production in order to personalise local services and support

Successful implementation of local arrangements for co-production in order to increase older people's choice and control, like personal budgets and different ways of managing your money, will be influenced by a range of local characteristics, including:

- The history of older people's involvement and leadership in service planning and delivery.
- Past experience, capacity and skills in developing user and peer led support, by as well as for older people.
- Current (and planned future) patterns in commissioning and provision that determine whether there is a broad range of options and opportunities for older people to have support in their lives.
- Older people's experience in planning for their own futures and managing their resources and entitlements.
- The extent to which older people know about and can access these options e.g. through universal information, advice and advocacy support - and through newly emerging brokerage services and roles.

Paying attention to these local factors and finding out what works for older people now, is crucial for ensuring that the pace of change and nature of local developments work well for different communities of older people.

Principle 2 - Older people feel safe to speak up and are listened to.



Seven principles of co-production with older people

There are seven underpinning principles that local authorities and their partners, older people and older people's organisations will need to demonstrate they are applying, in order for older people to really feel that they are a part of local decision making and problem solving.

1 Older people are involved throughout the process - from the beginning to the end.

2 Older people feel safe to speak up and are listened to.

3 We work on the issues that are important to older people.

4 It is clear how decisions are made.

5 Older people's skills and experiences are used in the process of change.

6 Meetings, materials and venues are accessible for older people - they can get there, prepare, be heard and follow progress through reports and minutes.

7 Progress is evaluated through looking at the actual changes in older people's lives.

Principle 3 - We work on the issues that are important to older people.



Making it Happen

The following practical steps were identified by older people, lead officers and strategic leads from three different areas working together to produce this guide on Co-production. They illustrate what these seven principles mean in practice.

1 Older people are involved throughout the process - from the beginning to the end.

Older people are involved from the design stage through to writing and presenting the reports from the group.

2 Older people feel safe to speak up and are listened to.

Clear agreements about how people can work together and support each other, for example ground rules that are developed by the group.

There is a variety of ways for people to get involved and to contribute, for example approaches such as rounds ensure that everyone has a turn to be heard.

A third of people in the room are older people.

3 We work on the issues that are important to older people.

Older people initiate the issues to focus on or contribute to defining the problem that is being solved.

4 It is clear how decisions are made.

There is an agreement about how decisions are made.

5 Older people's skills and experiences are used in the process of change.

People's skills and experiences are used through people having roles in the meeting and in making contributions, and by thinking about issues of recognition for the time people give, such as payment.

6 Meetings, materials and venues are accessible for older people.

Practical issues are addressed such as enabling people to get there by booking taxis, providing expense forms on the day.

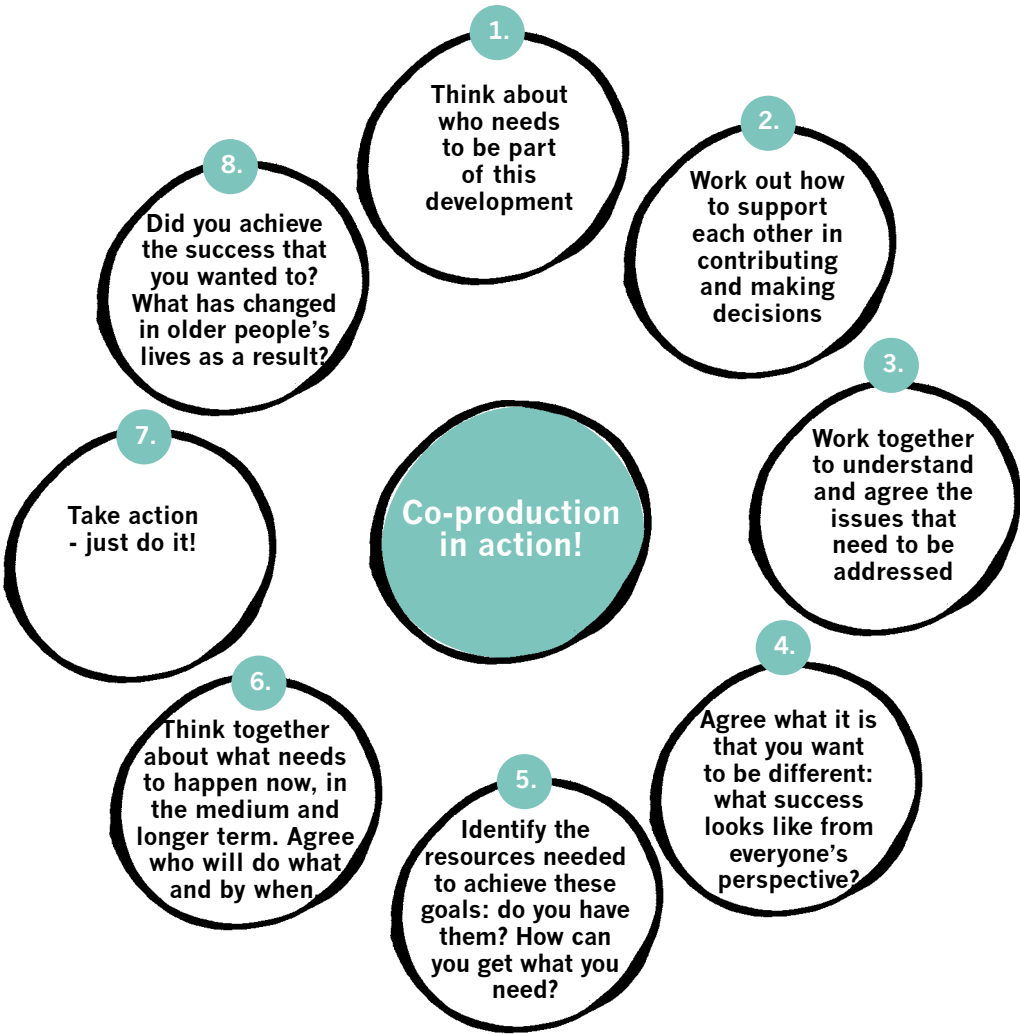
The venues are accessible and on major bus routes.

The time of the day and the pace works for people (for example starting mid morning and providing lunch, good breaks to enable people to talk and connect).

7 Progress is evaluated through looking at the actual changes in older people's lives.

Person centred thinking tools (like working/not working) can help reflect on what has changed for people.

This diagram illustrates how these principles can be translated into a series of practical steps that people can take when working together in a project, on an initiative, on a strategy or service design - or if they're starting to work together in this way for the first time (e.g. in a local neighbourhood or locality). The important thing here is that these steps are part of a cyclical and ongoing process.



Co-production in action

A story from Dorset Age Partnership

The Dorset Age Partnership is a network of older people made up of: representatives from older people's forums and groups across the county; strategic leads and lead officers from Dorset County Council; the primary care trust; the district councils; police, fire and rescue services; voluntary organisations etc. It is the theme group for the Dorset Strategic Partnership but has been designed as a partnership body where older people are in the majority, and an older person is always the Chair. It has district/locality groups, also with majority older people involvement, feeding into it to ensure that the strategic direction explored and set at the county level is translated into practical and tangible improvements on the ground. The Dorset Age Partnership is key in shaping Dorset wide strategies.

Examples include the development of an Extra Care Housing strategy for Dorset, where plans are reviewed on the basis of what works for older people (including the use of person centred thinking tools). For example, a planning application from a major care provider was rejected on the grounds that their proposed new scheme was too large and would not provide personalised support or promote independent living. The next step would be for designers to work with older people to make sure that in future they submit plans which meet their specification/criteria.

The Dorset Ageing Well Strategy has been developed through the networks involved in the Dorset Age Partnership. This includes over 100 older people who were recruited to work as community leaders, wayfinders and local evaluators as part of Dorset's early intervention and prevention work. In total over 4,000 older people who been involved in identifying local priorities for improving the health and wellbeing of older people across the county, which are embedded in the Ageing Well Strategy.

Make the benefits of co-production clear to everyone involved

The following points highlight key messages about both the rationale for and the difference that co-production can make.

Older people want to be in control of their own lives and to make a contribution

A story from Brighton and Hove

Brighton and Hove Lay Assessors (recruited through local 60+ Action Groups) regularly ask older people about their home care packages and experience of day to day support, across a range of care companies providing this support. There is a network of seven such assessors, all volunteers and members of the 60+ action group, who have been doing this over the last seven years (i.e. are experienced). They feed back to the agencies and the council about what's working/not working from older people's perspective. This activity is coordinated by the 60+ Action Group who have a good relationship with the council, and is funded by their Adult Social Care Directorate.

The 60+ group was also commissioned by the primary care trust to consult with all its members and with other older people's groups/forums to co-create their older people's single assessment process document, which was subsequently adopted by the primary care trust/council (without changing anything that older people wrote).

Brighton and Hove Council Sheltered Housing Advisory Group (a partnership between the council's housing department and Hanover Housing) have engaged the 60+ group in designing communal spaces in a supported /extra care housing development, to be both a good space for people who live there and for the local community. This resulted in this facility having a community café, an allotment, and the right chairs for older people to get in and out of. A community development model was used to build relationships, understand different people's perspectives, get to know the local neighbourhood etc. Paying attention to small things as well as big ideas is important. You need both.

Research shows that it works

Principle 4 - It is clear how decisions are made.



A story from Barnsley

Creating a carers' self assessment questionnaire

Last year Avril Watson and Julie Moore from the Self Directed Support Team working with Mick Stanley for the Professional Development and Support Team (looking at Fairer Access to Care eligibility) held a live session at Barnsley Arena with carers to develop the carers self assessment questionnaire (CSAQ).

We used a basic self assessment questionnaire for carers which was in Microsoft Office Word, this was then projected onto the wall so that everyone in the room could see the document. We went through this step by step, identifying areas that needed to be changed.

Carers had the opportunity to ask us questions in relation to the questionnaire. This took place over a half day session including lunch.

Feedback from the event was that it was innovative and people felt listened to, the document was created together and people felt they had greater ownership of it and understood certain issues around legislation which may affect what questions were asked in the carers self assessment questionnaire.

This was important as it was not just a 'professional' sitting at their desk putting together what they thought would make up a good carers self assessment questionnaire. It was created by people who have used the existing one, and also individuals who may be affected by the newly created one.

Government policy and guidance says we must!

Principle 5 - Older people's skills and experiences are used in the process of change.



What to co-produce?

Within reason you can co-produce anything. The following table summarises ideas and examples shared by the co-production design team in co-producing at two levels:

- At an individual level - ensuring that older people who need support take or keep control over key decisions about their support and have increased choice over what support they receive.
- At a community level - ensuring that older people's voices and experiences are harnessed in key decisions about local services and solutions.

Co-production with older people who need support in their lives

Work with older people who need support to help them identify their own goals and the support they need to achieve them - this is co-production, often referred to as self-directed support.

Support older people, their family and carers to plan for and use a personal budget; and in personalising support that the council or others provide and manage on their behalf.

Involve older people, their family and carers in monitoring the quality of support and services provided.

Co-producing services and solutions with older people in local communities

Work with people where they live to really understand their daily lives; ask them what works well for them and what doesn't work so well.

Share power in local planning processes so that communities can help determine what issues should be tackled and how.

Ask communities what support they need to take more control over the planning, designing and commissioning of local services.

Getting started and applying the seven principles

There are no hard and fast rules: co-production is a process and a way of thinking, not a set of rigid tasks. This simple plan suggests the kind of things you need to do if you are to co-produce successfully, illustrating how the seven principles that underpin co-production with older people can be applied at a local level.

The 7 principles

Older people are involved throughout the process - from beginning to end.

Additional thoughts

Focus on being clear about what you want to achieve before asking for help/contributions but also build in flexibility to adapt this based on feedback.

Applying the 7 principles to local practice

Identify and contact the people who will be affected by your initiative/project/strategy/service development.

Older people feel safe to speak up and are listened to.

Taking time to get to know everyone involved is essential for building mutual respect and trust - key ingredients for co-creating change!

Ask people what support they need if they are to work with you as partners.

Everyone involved is supported and encouraged to be attentive to people's needs, establishing security and trust for all participants.

We work on the issues that are important to older people.

Sometimes policy makers and service providers need 'their hands held' to work in this way.

All those involved agree not to impose their issues on others.

Participants are supported and encouraged to listen in order to fully understand and then agree the issues to be worked on.

Principle 6 - Meetings, materials and venues are accessible for older people.



The 7 principles

Additional thoughts

Applying the 7 principles to local practice

It is clear how decisions are made.

Don't forget there may also be constraints e.g. political/resource considerations.

Co-production is about joint action.

Agree what needs to change.

Agree the difference/s that you want to see (what success looks like).

Negotiate common ground - don't impose it.

Be honest and open about the financial, human and other resources that are available to make change happen.

Don't just talk about it - get on and do it.

Older people's skills and experiences are used in the process of change.

Every co-produced strategy can be tracked to changes/improvements in people's lives.

Use older people's direct experiences of services and support to redesign services and personalise support.

Identify who else needs to be involved to achieve the agreed changes and get them on board.

Significant change requires effective engagement.

The 7 principles

Meetings, materials and venues are accessible for older and disabled people.

Additional thoughts

Plan ahead. Don't leave until the last minute.

Applying the 7 principles to local practice

Agree how you are going to work - and who does what, when, how and where.

Book venues after agreeing what work needs to be done face to face; and check the individual requirements of every participant so they can contribute fully.

Make sure expenses can be reimbursed either at the time or as soon as possible afterwards. Clarify these arrangements with everyone involved.

Check the materials and media required for everyone to be able to share and understand records of discussions, agreements, action and progress.

Engage different participants in different roles and activities: making notes, distributing information, writing bids, engaging partners, accessing assistance etc.

The 7 principles

Progress is evaluated through looking at the actual changes in older people's lives.

Additional thoughts

Make allowances for researching change. The evidence base will help future developments. But keep it proportionate; sometimes asking simple questions to obtain feedback will suffice. Other times a fully funded research project is needed.

Applying the 7 principles to local practice

Don't just talk about change; demonstrate what has been achieved, and how.

Make sure everyone knows they are accountable to each other, to funders and local partners and communities.

Look back on what you have done, agree what went well, what didn't go so well, and what you would do differently next time you co-produce.

Principle 7 - Progress is evaluated through looking at the actual changes in older people's lives.



Co-producing commissioning

A Department of Health initiative, working with four local authorities, explored how to achieve better commissioning through co-production. They used information from individuals' care plans and person centred reviews to identify what needed to change in future commissioning plans.

This process supported participating authorities to use the information obtained as follows:

Information from person centred reviews	Implications for commissioners and providers in developing the market
What's working?	Plan what it would take to spread this practice.
What's not working?	Plan what it would take to change this - action at operational and strategic level.
What's important for the future?	Inform market development and commissioning.

Co-producing change with older people

How person centred reviews can inform strategic commissioning

Working Together for Change is a simple, systematic process using person centred information from reviews and support plans to drive strategic change in commissioning with and for older people. It collates and analyses person centred information to provide powerful insights into what works and doesn't work in people's lives; as well as their aspirations for the future. The Department of Health's Putting People First Programme worked with Helen Sanderson Associates and four councils in early 2009 to test and refine this method. The experience has shown the approach to be flexible, transferable and effective. Here we describe the process and why it is important through the story of Dennis, 82, who lives alone and has carers who support him every day from a domiciliary agency.

Person centred information

The Working Together for Change process begins with person centred information: a person centred plan or person centred review. These lead to actions based on what is working in the older person's life, addressing what is not working and moving towards what they want in the future.

Dennis has a personal budget. At his person centred review, he talked to Lucy, his care manager, about the support he received. When asked 'what is working', Dennis talked about his friendship with his neighbour, and visits from his family. When asked 'what is not working', Dennis said 'staff talk over my head - I feel like a package and not a person' and that he got cold when he had a wash. He was washed in a cold bathroom because his carer got too hot. In the future, Dennis wants to take up his steam train hobby, get the monthly steam train magazine, and visit his daughter in Weymouth. Lucy and Dennis thought together about what needed to happen to change things, and came up with a list of actions including talking to the manager of the service before looking at using his budget to

purchase different support. Another action was writing in detail how he wanted to be supported, in a way that all of the staff who supported him could follow. Lucy took Dennis' information to a 'Working Together for Change' day and asked him for his top two 'working', his top two 'not working' and his top two 'what he wanted in the future' ideas.

Using person centred information to inform strategic commissioning

Anonymous information from Dennis and fifteen other people's reviews was shared at a one day workshop with commissioners, members of the Older People's Association, care managers and providers. All the information was aggregated and written onto cards - red for 'what is not working', green for 'what is working', and blue for 'what people wanted in the future'.

The facilitator read out each of the green 'working' cards and the group decided which cards were similar, and then what to call each theme. Everyone then had a chance to comment. There was a wide range of positive, encouraging themes, suggesting areas that were working well for people. They repeated the exercise with the red cards. There were several other cards with similar issues to Dennis's. For example: "Agency carers...there are too many of them...men and women thinking they can do it. I will do it myself" and "I am not allowed to use a wheelchair to push myself around the house due to the risk of scraping my knuckles on the door jamb". The group decided to call this cluster 'I am not treated with respect or as an individual by my paid carers'.

There were four other clusters of what was not going well for people. The group said this information was not new but felt more powerful seeing it all together, in the older people's own words. Finally, the group clustered the blue cards that looked at what people wanted in the future and found people did not want extraordinary things, but more everyday experiences like going out, meeting people, taking a holiday or starting a hobby.

The group analysed the 'not working' clusters. People worked in teams of older people, commissioners, providers and care managers and discussed possible root causes. Lucy was part of the group looking at the 'I am not treated with respect or as an individual by my paid carers' cluster. Their list for why people might not be treated with respect included observations that:

- Paid carers are too task focused and not outcome focused.
- Paid carers are not matched to older people.
- Paid carers get poor quality training and supervision.
- Information is not recorded for carers to use.

They shared this with the other groups and thought about what success would be like for older people, staff and managers if they could address these issues.

What would people say if they changed things for the better?

The group decided that older people would say:

“My carers listen to me and understand what is important to me.”

“I look forward to my carer visiting me.”

The staff supporting older people and their managers would say:

“I get good training and support.”

“It is easier to respect others when you are respected yourself.”

“I have all the information I need - we have written information about what matters to the person and how best to support them.”

Each group did the same process for their 'not working' cluster and wrote it up on a poster 'What would success look like?' They looked at the roles of commissioners, providers, care managers and the Older People's Association and asked what each could do to work towards this success. The Older People's Association offered to work with providers in the recruitment and training of staff.

The providers looked at what they could influence, and thought about possibilities with the care managers. They committed to things like recruiting staff more locally, having people working a wider range of hours and matching staff to older people by developing one page profiles to describe what matters and how people want to be supported. They would then use a 'matching staff' tool to get better matches for personality characteristics, hobbies, interests and skills. Staff could use their one page profiles to introduce themselves to the people they support. The providers also committed to reviewing how they supervise and support staff and individuals and re-evaluate the training they provide for carers.

How older people's views inform commissioning

The commissioners took their information to a further meeting and put the information alongside data from the joint strategic needs assessment and other sources.

The Commissioners decided to:

- Further analyse review data to determine best practice if, and where, people have reported that relationships with their care staff are working particularly well; and encourage replication by other providers.
- Develop Individual Service Funds for domiciliary care services to empower individuals to design their own support and express preferences regarding care staff.
- Use this and other priority areas identified through Working Together for Change to set the overarching outcomes for an outcomes-based approach to commissioning for all future older people's services.
- Commission specific direct payments service for older people, offering specific support with employment, legal and HR issues.
- Consider designing or commissioning a web-based database for personal assistants/ care workers that supports person-to-person transactions (e.g. slivers of time) where individuals can build networks of care staff and choose between them.

Lucy shared with Dennis what had happened on the day. The individual actions agreed at his review were having an impact. He was warm in the bathroom now. He enjoyed working with Lucy to put together his one page profile, and could tell that staff had read it and that some were using it to think about how they supported him. Hopefully the actions the providers agreed to would change things in the short term for him and others in a similar position. The commissioner's actions should mean people will be less likely to receive a service where they were not treated with respect and as an individual.

Dennis' story shows how person centred information can drive strategic change in organisations and affect improvements in commissioning. Working Together for Change is a tried and tested tool councils can use to ensure the current changes in adult social care are co-developed and co-produced with older people and families. As well as helping those undertaking joint strategic needs assessments, it can provide a way to understand and measure the outcomes of personalisation by generating and analysing qualitative data for commissioning; improving the links between strategic decision makers and the people they serve.

Conclusion

Since we started to write this guide, a number of important new reports have been published that emphasize the need for all of us to work together to ensure that older peoples voices and priorities shape the nature of public services and local service delivery.

These include:

- Achieving age equality in health and social care (DH, October 2009) highlighting the need to end age discrimination in local service commissioning and delivery. Coproduction is one of the key areas that services will be asked to rate themselves on as part of their local improvement plans.
- Building a Society for All Ages (HMG, 2009) is the draft Strategy for an Ageing Population which government has been consulting on over the summer and autumn months.
- Plans for a Families Green Paper have been announced, with a view to this being published for consultation next year.
- The Care and Support Green Paper has also been out for consultation focusing on what needs to happen in order to develop and deliver sustainable, fair and equitable services for all adults who need support in their lives.

Each of these reports illustrate the need for local, regional and national solutions to common issues experienced in the provision of local services that we all use and need. Working in partnership with a wide range of older people is central to achieving the goals and addressing the problems they highlight.

We hope this guide has inspired you and helps you to adopt the seven principles of co-production that older people and local authority strategic leads and service managers have identified. The stories and practical steps illustrate how transformational change can happen, and is more likely to be effective, when different stakeholders come together to find solutions that work for everyone.

You can share your stories and examples of co-production at www.ndti.org.uk and www.helensandersonassociates.co.uk

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