**Llinos Mary Jehu**

**PhD thesis**


**Co-production and Legitimacy:  the role of lay people in the Strategy for Older People in Wales**

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# ABSTRACT

Using the Welsh Government's Strategy for Older People as its example, this thesis aims to address questions arising from government encouragement, and sometimes insistence, on co-production in circumstances where the mechanisms are not defined and the legitimacy of any outcome is unchallenged.  It seeks to find out what motivates older people to become involved in voluntary activity, considering why lay people may feel they have a legitimate right to speak or act for others, and why partnerships view them as legitimate representatives.  Using network and power theories, it considers how and why people engage with or are missed from the mechanisms developed to engage them.

The thesis starts with a review of academic literature and other knowledge sources. Following chapters address the challenges inherent in a research question which aims to consider the potential for co-production mechanisms to exclude, and give an outline of the policy context.

The chapters on Motivation, Networking and Legitimacy illustrate contradictory claims of legitimacy, the importance of networking (rather than committee-based) skills, and the influence of clique membership and allegiance.  The thesis concludes that in the example considered, power was unevenly balanced and this did govern and sometimes limit the approaches to co-production adopted, resulting in some people being excluded from the process entirely.  However, it was not a simple imbalance of power between statutory organizations and older people.  The approaches adopted, both very formal and less formal, attracted people who were motivated and suitably skilled to build their social networks.  Consequently, whilst the research started by questioning whether existing approaches to co-production exclude, and so are not legitimate and lead to outcomes which are unjust, it ends by questioning whether concepts of legitimacy are just.  This contribution to existing theories of legitimacy lead to questions which currently are not being addressed.

*Dedicated to the memory of*


*Joseph Austin Jehu*


*1923 - 1986*

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## ACKNOWLEDGEMENTS

## DEFINITIONS

| | |
|---|---|
| AWF | All Wales Forum for Older People[1] |
| BTR | "Below the Radar": voluntary activity which is not regulated by the Charity Commission |
| CAMRA | Campaign for Real Ale |
| CHC | Community Health Council |
| CVSC | County Voluntary Services Council |
| IVAR | Institute for Voluntary Action Research |
| NCVA | National Council for Voluntary Organizations |
| NHS | National Health Service |
| NPF | National Partnership Forum |
| OPAG | Older Persons Action Group |
| SCIE | Social Care Institute for Excellence |
| TSRC | Third Sector Research Centre |
| U3A | University of the Third Age |
| UNISON | One of the largest UK trade unions, representing public services staff employed in the public and private sectors. |
| VFI | Volunteer Function Index |
| WCVA | Wales  Council for Voluntary Action |

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[1] The name of this group has been changed to protect the identity of participants

| WLGA | Welsh Local Government Association |
|------|-----------------------------------|

# Chapter 1 - Introduction

This thesis aims to address questions arising from government encouragement, and sometimes insistence, on co-production of policies and service delivery plans, working in circumstances where the mechanisms for doing so are not defined and the legitimacy of any outcome is unchallenged.   Using the Welsh Government's Strategy for Older People as an example of a policy which seeks to tackle discrimination and give people a stronger voice in society, it considers whether co-production based on labelling or categorising a population in a way which individuals may not have chosen for themselves challenges anti-social norms or reinforces and perpetuates them.  It goes on to consider whether the balance of power within co-production initiatives govern the approaches, mechanisms or structures adopted, consequently excluding some lay people and leading to decisions which are not legitimate and to outcomes which are unjust.

Inter-organisational partnership or collaborative working has been the subject of academic studies and policy developments for at least the past 50 years, both in the UK and on an international level (Rowe 1978).  In their introduction to a review of the literature on partnership working carried out for the National Leadership and Innovation Agency for Health Care in Wales, Williams and Sullivan (2007) refer to Pollitt (2003,35) presenting  the notion of joined up government as "the aspiration to achieve horizontally and vertically co-ordinated thinking and action".  Williams and Sullivan also refer to the political science notion of governance (Rhodes, 1996), which Stoker(1998) describes as "a set of institutions and actors drawn from, but also beyond government, where boundaries and responsibilities for tackling social and economic issues are blurred",  and finally to a growing need for governments to address the "wicked issues" (Rittel and Weber,1974) which face society, such as the need to improve health, or reduce crime, which cannot be managed by a single organization acting independently.

The above work can take various forms, and is not restricted to a particular model or legal framework.  In order to carry out a review of findings from projects completed over a 10 year period, the Institute for Voluntary Action Research defined

"collaboration" broadly to include all kinds of interactions across the boundaries of two or more voluntary organizations; from temporary cooperation, strategic alliances and consortia through to takeover and merger. This included :

- instances of inter-organisational interaction which were not explicitly seen as collaboration by participants – for example, interactions labelled as partnerships
- collaborations between the public and voluntary sectors
- collaborations whereby public sector organizations purchased or commissioned services from voluntary organizations.

(Cairns et al, 2011, 8)

This variety of possibilities, ranging from legally binding contractual arrangements to arrangements where organizations appear to "meet up and see how it goes", is a reflection of policies which have directed that collaboration should and must happen, but which have not prescribed how it should happen.  Consequently organizations have had to learn how to collaborate, and it is generally agreed that this has not been an easy process.  The report identified a number of experiences which were common to the studies they reviewed:

- collaboration is a long-term, ongoing process; not a specific, finite or time-limited organisational event.
- what happens within and between organizations is closely linked to the environment in which the organizations have to operate
- there is a need to reconcile the often competing agendas of the various internal and external stakeholders involved in a collaborative venture.  Parties need to be able to visualise the process as a form of 'exchange', in which all parties give up some cherished beliefs and practices in order to gain the benefits they sought for their clients and organizations in the longer term.
- many collaborative ventures are driven by a single key individual – usually a paid employee or volunteer trustee, "Collaboration champions".
- the management of collaboration requires a distinctive set of specialist competencies.

- VCOs contemplating collaborative ventures are likely to learn from the experiences of other VCOs – including those with different organisational features

(Cairnes et al, 2011, 37-38)

Evaluations of the various models of collaborative working and of the consequent outcomes have been generally positive.  To some extent this could be publication bias resulting from studies being commissioned by organizations responsible for putting policy into practice.  However, the benefits reported suggest that there are at least some advantages to investing time, money, emotion and many other resources into making it happen.  The evaluation of the UK Government Compact framework in England, carried out by the Third Sector Research Council, identified many weaknesses with the framework at a national level, but found that it had been influential at a local level in many areas (Zimmeck et al, 2011, 8).  At a very local level, an evaluation of a project which brought together statutory, voluntary and community sector bodies to improve planning and commissioning health and social care services in Conwy reported measurable and unexpected improvements in service users' independence (Dickinson & Neal, 2011).  At a strategic level, implementers of policy may always be made to adapt to the extraordinary impact of changes in government and changes in individual post holders.  At a local, service delivery, level, organizations are not affected by these changes to the same extent, and so are possibly better placed to reconcile competing agendas, develop collaborative competencies and embark on the long-term process that collaboration requires.

One aspect of such partnership or collaborative working is the involvement of lay people in the service planning process and in service delivery.  This involvement has been termed "co-production" in some circles though the term is by no means universally accepted or recognised.  Loffler and Bovaird (2010, 6) note that the term is largely unknown and sometimes also disliked in local government within the UK, and go on to say that in other countries the term "co-responsibility" is more common.  However it is a term which is growing in acceptance by academic institutions within

the UK, including the Third Sector Research Council, and so it is the term used in this study.

There is a long established history of lay people being involved in service planning and service delivery processes, simply on an individual basis such as people voting in government elections or putting out their bins for the weekly refuse collection service, and on a collective basis such as groups lobbying local and central government on issues which concern them or working together to put on a street party or clear up the local park.  Governments have sought to encourage and support co-production.   The literature review carried out for this study has identified co-production based projects to address a wide range of health, economic, education and community safety matters across the world.  In Wales, the Welsh Government has made co-production a strategic aim and consequently a requirement for successful funding applications for all of its main policy areas, including the Communities First programme which aims to address poverty, Community Safety partnerships, Adult Mental Health services, Children and Young People's services and services for older people.  The flagship policy of the UK Coalition Government, "The Big Society", was also based on the principles of co-production:

> "You can call it liberalism.  You can call it empowerment.  You can call it freedom.  You can call it responsibility.  I call it the Big Society"
>
> (Prime Minister speech, Liverpool, July 2010)

This thesis is divided into 9 chapters. Chapters 1- 4 set out the basis for the research.  The Introduction is followed by a review of both academic literature and other knowledge sources, including research carried out by non-academic institutions funded by governments, political parties or charitable institutions, as well as un-edited published letters or digital stories by lay older people.  The decision to include these sources of knowledge arose partly from the literature review having a predominance of data collected by or gathered from individuals or organizations in positions of power within collaborations, suggesting a need to seek out the voice of

lay older people.  The decision also arose from an acknowledgement that decisions about policy and resources are not necessarily the result of governments' considering peer-reviewed research and evidence (McClelland, 2011, slide 11), and so needing to consider other sources of influence.  Chapter 3, Design and Methods, addresses the challenges inherent in a research question which aims to consider the potential for co-production mechanisms to exclude.  Practical issues are discussed, such as those arising from decisions to share control of the data collection process, seeking to engage with lay older people in environments of their choosing or during activities of their choice, and of taking steps to engage with people who are not engaged with formal co-production mechanisms.  The chapter also considers the ethical requirements common to academic research, questioning whether these achieve the purported aim of protecting vulnerable people or whether they also form a barrier, excluding some from the research process.  The chapter includes a description of pilot studies carried out to trial different data collection methods and approaches to analysis, leading to the decision to collect data from 4 sample groups, using a variety of qualitative data collection methods and analysis using Framework. The chapter ends with a statement on my (the researcher's) place within the policy and research arena.  Finally, Chapter 4 gives an outline of the policy context, both at a Welsh Government level and at the local level at which data were collected.

Chapters 5 – 8 present empirical data.  Chapter 5 considers what motivates older people to become involved in voluntary activity, drawing on theories of motivation and generativity.  Different forms of voluntary activity are considered:  activity directed and supported by organizations regulated by the Charity Commission and activity by groups which are unregulated and which would fall under what are sometimes referred to as Below the Radar or BTR groups (McCabe et al 2010). Differentiation is also made between voluntary activity which requires direct action, and voluntary activity which involves committee-based activities.  Whilst concurring with some earlier research, it also finds reasons which are specific to and grow from people becoming older.  These include people who have no previous experience of voluntary activity being motivated by a wish to challenge age discrimination, an increase in confidence and a willingness to take risks.  A wish to maintain professional identity is also shown to be a powerful motivation for many older people's actions, with examples of it being so extreme that achieving it deterred

other older people from becoming engaged in a given activity.  Chapter 6 considers legitimacy:  why lay people may feel they have a legitimate right to speak or act for others, and why partnerships as a whole view them as the legitimate representatives of others.  Whilst identifying reasons for supporting or justifying a person's claim, the chapter also identifies contradictions, with a source of legitimacy being accepted in some circumstances but rejected in others.  Ultimately, the chapter concludes that legitimacy is a retrospective attribute, only being awarded or recognised after a goal has been achieved.

Using network theory, Chapter 7 considers how and why people engage with or are missed from the mechanisms and structures developed to engage them with the Strategy for Older People.  The chapter goes some way towards resolving earlier questions of why some people are under-represented.  It also challenges theories of trust increasing with time, suggesting that repeated negative experiences can decrease trust, leading to people choosing not to engage and so networks and consequent opportunities to share knowledge and resources being limited.  The chapter finds that motivation and skill in judging when to challenge and when to build alliances are important in the process of securing relationships with those in positions of power who can award legitimacy, leading to the development of cliques.  Whilst concurring in part with earlier theories of Boundary Spanners, the chapter concludes that the role requires a level of independence that is unlikely to be held by someone in an employed role.  It also presents examples of older people who clearly have the skill to take on this role but are deterred from doing so by over-burdensome demands of time, formality and administration.

 Chapter 8 uses theories of power to build on the findings and conclusions of earlier chapters on motivation, legitimacy and networks.  In doing so, it addresses the questions posed in these earlier chapters concerning the various and contradictory claims of legitimacy, the importance of networking (rather than committee-based) skills, and the influence of clique membership and allegiance.  The chapter finds a close association between power and networks, with contradictions being accepted because of allegiance to a clique rather than because of allegiance to a model of power.  The chapter also finds examples where the strong link between networks and power is used to determine the co-production mechanism adopted, sometimes

inadvertently excluding certain older people from the process of decision-making but sometimes doing so deliberately.  These findings call into question assertions that some mechanisms and structures for collaboration and co-production are inclusive because they are not dependent on traditional, formal committee skills.  In identifying clique membership as being fundamental to being awarded legitimacy and controlling the co-production mechanism adopted, the chapter contributes to understanding of why what have been called "minorities within minorities" continue not to have a voice in the decision-making process .

The thesis conclusions are presented in Chapter 9.  Rather than challenging anti-social norms, it concludes that actions taken ostensibly to empower older people limit and sometimes take away opportunities for them to be involved in decision-making,  reinforcing and perpetuating existing anti-social views of older people and possibly creating new ones.  It concludes that it is clique membership, not assertiveness or lack of experience of formal ways of working, which silences minority groups.  Regardless of how proud people may be of their individual identity, and regardless of the involvement and support they give to their minority communities outside of the collaboration's activities, people avoid drawing attention to the difference between themselves and the common identity of the clique as to do so could represent a challenge and therefore risk exclusion from it.

The thesis concludes that in the example considered in this research, power was unevenly balanced and this did govern and sometimes limit the approaches adopted, resulting in some people being excluded from the process entirely.  However, it was not a simple imbalance of power between statutory organizations and older people. The approaches adopted, both those which were very formal and those which were less formal, attracted people who were motivated to build their social networks and who had the skills to do so.  This does not mean that they were not also motivated to participate in decision-making for the benefit of other older people, but it does have implications for the legitimacy of the contribution made.  Consequently, whilst the research started by questioning whether existing approaches to collaboration exclude, and so are not legitimate and lead to outcomes which are unjust, it ends by questioning whether concepts of legitimacy are just.  Whilst contributing to existing discussions of why some groups may not be involved in the mechanisms developed

to involve older people, this research's contribution to theories of legitimacy leads to questions which are currently not being addressed. Politicians and academics need to ask whether it is just for legitimacy to be something which is awarded and buttressed by those in positions of power rather than awarded by peers.

# Chapter 2 - Literature and Knowledge Review

## Literature Review

### *Literature Review method*

An initial comprehensive literature search was carried out in March 2010, using the ISI Web of Knowledge database.  The work aimed to identify papers relevant to the following areas:

- models of multi-disciplinary or multi-sector working in the field of health and social care.
- factors which promote/support multi-disciplinary or multi-sector working
- factors which hinder multi-disciplinary or multi-sector working

The literature search was maintained through attendance at relevant conferences and seminars, and through registering with Emerald Group Publishing alerts.

Further searches were carried out following the data collection period in order to examine themes arising during the data collection process, notably themes of motivation, legitimacy, networks and power balances.  This work sought to identify research works associated with these themes, and to identify suitable theoretical frameworks for their analysis[2].

### *Literature Review initial search results*

The search was not limited by language, country of origin or by research method adopted.  The search was limited to articles published after 1990.  An outline of the process followed and results generated is given below:

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[2] A consequence of this strategy was that the main body of organisational behaviour literature was not included initially, although elements associated with volunteer motivation were included in the later stages.

*Fig 1:  Literature review results*

| Step 1 | *Title search:* Partnership + Voluntary Sector + Statutory Sector | 1,940 |
|---|---|---|
| | | |
| Step 2 | *Subject area search:*  Health care + social science + government + law + public health + public administration | 580 |
| | | |
| Step 3 | *Manual sort based on article title – exclude:*<br>• Single patient/person outcome<br>• Intra country / political partnerships<br>• Biology/chemical partnerships<br>• Environmental partnerships<br>• Technology/telemedicine partnerships<br>• Economic partnerships<br>• Veterinary partnerships<br>• Financial partnerships | 364 |
| | | |
| Step 4 | *Sort on abstracts and full text where available* | |
| | • No abstract available | 139 |
| | • Deleted following reference to abstract | 27 |
| | • Academic partnerships – professional and students | 22 |
| | • Individual patient/service user partnerships outcome | 8 |
| | • Medic patient specific partnerships | 8 |
| | • Partnership outcome evaluation | 94 |
| | • Partnership process evaluation | 63 |
| | • Research method | 3 |
| | | |
| *Step 5* | *Data extraction* | |

***Literature Review data audit forms***

Data were extracted from the full text of papers, where available, and held on data audit forms (Microsoft Excel workbook).  The data audit forms were made up of the following categories:

- Refworks id
- Author
- Title
- Date
- Aim
- Sample
- Method
- Partnership of
- Serving
- Country
- Theme (1, 2 & 3)

**Knowledge Review**

This research aims to address questions of collaborative working and user participation within the policy area of the Welsh Government Strategy for Older People.  Whilst collaborative working and user participation have both been major matters of interest to academics concerned with public policy for many decades, policy development and decisions are the result of a range of influencing factors, not just the findings of academic research.   In a presentation to the Age Alliance Wales Conference, 2011, McClelland described the "policy community" as being made up of politicians, civil servants and managers, along with a wide range of others including professionals, the media, pressure groups, third and private sector organizations, and the people who used services themselves.   McClelland concluded that "Lots of decisions about policy and resources are not based on evidence" (McClelland, 2011, slide 11).

Consequently, along with a review of the academic literature, it was useful to carry out a review of the knowledge available from other sources within what McClelland refers to as the policy community.  However, as the members of this policy community are so diverse, both in number and in the level of influence they may have over policy decisions, it was also useful to consider the source and the standard of the knowledge which each may have.  Whereas literature from academic sources may have an identifiable source, and may be of a recognised standard, the same cannot be assumed of knowledge gathered from other sources.

*Knowledge review method*

Pawson et al (2003,  25-26, Appendix 1 refers), propose a classification of social care knowledge based on five sources of knowledge:

1. Organisational knowledge

2. Practitioner knowledge

3. User knowledge

4. Research knowledge

5. Policy community knowledge

Pawson also acknowledges that assessing the standard of knowledge from each of these sources is far from straightforward:

> "Standards thinking is highly developed within the 'research' and 'organisational' communities but it is much harder to find materials relevant to other types of knowledge. This no doubt reflects the infancy and difficulty of work on quality appraisal in these areas"

(Pawson et al 2003, 32)

Consequently, knowledge based on sources such as people who use services, people responsible for the direct delivery of services, or researchers funded by political parties, may need to be approached with caution. However, this should not mean that this knowledge should not be considered at all. As Pawson concludes:

> "By placing all potential sources of knowledge side by side at the entry point to the social care literature, this approach sends a powerful message that all are of potential value. It does not privilege one type of evidence above another, but nor does it preclude the possibility of making quality judgements about particular pieces of evidence within each source"

(Pawson et al 2003, 24)

A search was made of major non-academic research institutions concerned with social problems and needs, together with research collaborations involving non-academic partners.

- Social Care Institute for Excellence (SCIE)

- Pathways through Participation Project (Big Lottery Fund, NCVO, Involve, Institute for Volunteering)

- Joseph Rowntree Foundation

- Involve

- Institute for Volunteering Research

- Third Sector Research Centre

- Institute for Voluntary Action Research

Searches were made on the terms "collaboration" OR "user participation" OR "multi-agency".  Records concerning evaluation of treatments, evaluation of education or professional development progammes and evaluations of inter-research institution collaborations were excluded.

The search was expanded to include smaller organizations concerned with older people within the UK and which had a research role but also other roles, such as the promotion of rights of older people or the promotion of the role of the organisation's members.

- Age UK

- WLGA (Welsh Local Government Association)

- Older People's Commission Wales

- Volunteering England

- Age Alliance Wales

As the amount of material was far smaller on these sites, the search was based on a review of the title and contents of each item.

The review was confined to English language studies published from 2000 to date.

## *Knowledge review search results*

*Fig 2: Knowledge review results*

| Source | Number of records |
|---|---|
| Social Care Institute for Excellence | 52 |
| Pathways through Participation Project (Big Lottery Fund, NCVO, Involve, Institute for Volunteering) | 8 |
| Joseph Rowntree Foundation | 26 |
| Involve | 1 |
| Institute for Volunteering Research | 6 |
| Third Sector Research Centre | 4 |
| Institute for Voluntary Action Research | 8 |
| | |
| Age UK | 4 |
| WLGA | 3 |
| Older People's Commission Wales | 10 |
| Volunteering England | 1 |
| Age Alliance Wales | 3 |

***Knowledge review data audit forms***

Data from full texts were summarised onto data audit forms, using an Excel spreadsheet and cross-referenced with Refworks bibliographic management software.  The following headings were used:

- Refworks id
- Author
- Title
- Date
- Aim
- Knowledge source
- Method
- Partnership of
- Serving
- Country
- Themes (1, 2 & 3)

**<u>Outcomes of the review</u>**

***Literature Review outcomes***

The findings of this literature review concur with those of a paper presented to the British Academy of Management Conference in September 2010 by the Third Sector Research Council (Loffler and Bovaird 2010,12).  In this paper, the authors concluded that:

> "Evaluations of co-production approaches are rare. …  there is hardly any quantitative research on co-production in public services. So far, most literature is qualitative, drawing on case studies – the most prominent being Alford's comparative analysis of co-production in postal services, employment and tax services (2009). The only international example of a detailed quantitative study is the 2008 citizen survey undertaken by Governance International in co-operation with Tns-Sofres in five European countries, including the UK, which shed some light on the scale or potential of co-production in three public services – local environment, health and public safety."

The largest proportion of partnerships studied were concerned with actions to improve health, prosperity and general wellbeing of individuals and communities; that is, partnerships attempting to address what Rittel and Webber referred to as "wicked issues".   Most of these studies were from the USA (n=76) and the UK (n=67).  However, there were also a number of studies from Western Europe, Australia and New Zealand, Canada, Africa and Asia, suggesting that the development and outcomes of partnerships or alliances is of international interest.

Most studies used a mix of quantitative and qualitative research methods. Regardless of the method used however, most data were collected from people in positions of authority (senior managers, elected representatives), although a small number of studies also collected data from people who would be affected by the work of the partnership as well as contributing to it.  Many of the studies were evaluations of pilot interventions where pre- and post- measures of behaviour or health of people served by the partnership were reported.

The majority of studies reported the success of partnership working and the additional achievements made by organizations and individuals working together, for example Davidson's study of a partnership of key education providers, policy

makers, non-government organizations, local health services and aboriginal community controlled organizations in Australia (2008), and Schofield's study of a partnership of health professionals, communities, managers of health care institutions, educational institutions and government departments serving minority Francophone communities in Canada (2007).  Whilst all studies reported some difficulties in adapting to partnership working, very few reported partnerships having failed or being in a position where participants felt little or nothing was being achieved.  This is possibly publication bias arising from organizations being more willing to publish their successes than their failures, rather than a reflection of the success rate of partnership working.   It may also be a result of bias in the evaluation method adopted.  For example, Guarneros-Meza et al's assessment of the Welsh Assembly Government's policies for local government regarding collaboration, citizen engagement and commitment to partnership working (2009), which was commissioned by the Welsh Assembly Government, was generally positive.  This work collected data only from local government managers and elected members and not from people who would be affected by the work of the partnership, such as voluntary sector representatives or lay people.

There were exceptions, such as Lamie and Ball's  evaluation of a community planning partnership in East Scotland (2010), which found that, whilst partnership members were satisfied with the process of working in partnership, focus group data from residents associations suggested serious difficulties and perceptions from residents that services had not improved.  As well as being exceptional in reporting a lack of success, this study is relatively unusual in that it collected data from people affected by the work of the partnership.

### *Knowledge Review outcomes*

Of the items collected, 5 were items within the Older People's Commission quarterly newsletter, 2 were digital stories produced by the WLGA and the remaining were reports which were publicly available.

The majority of these items addressed the same themes as those found in the literature review:

- The framework necessary for successful partnership working, such as one where partnership members had the time to commit to the partnership, shared a clear understanding of what the partnership aimed to achieve, trusted and respected each other and where there was flexibility both in the ways that individual members were able to operate and in the operation of any organization which they represented. (n = 70)

- The balance of power between partnership members, and the impact of external networks on a partnership. (n = 54)

- The behaviours or competencies required for successful collaborative working (n = 44)

The themes of legitimacy of partnerships (n = 32) and of questions of how best to evaluate partnerships (n = 11), which appeared in the most recent items of the literature review, appeared to a greater extent in the knowledge review. Finally, a new theme of the drivers of partnership working appeared in this literature (n = 28). The remaining items were either descriptions of a particular partnership or collaborative venture, or an evaluation of one.

The main sources of knowledge were people who used services (n = 64) and practitioners (n = 52). This was the case for large non-academic research organizations such as the Joseph Rowntree Foundation (user = 20%, practitioner = 7%), and the SCIE (user = 32%, practitioner = 31%), and also for non-research based organizations such as the Older People's Commissioner (6 of the 7 items

were based on user knowledge), and the WLGA (of 3 items, 1 was based on practitioner knowledge, 1 on user knowledge and 1 on both practitioner and user knowledge).

## Themes

### *Partnership framework*

In the literature review, a major theme related to the framework necessary for successful partnership working, namely one where partnership members had the time to commit to the partnership, shared a clear understanding of what the partnership aimed to achieve, trusted and respected each other and where there was flexibility both in the ways that individual members were able to operate and in the operation of any organization which they represented.  This was evident in government sponsored research in the UK, for example that commissioned by the Cabinet Office to investigate opportunities for delivering more integrated and efficient local services (Callender 2007).  Based on findings from 26 multi-agency projects which were judged to be successful, the research reported that all shared similar characteristics, namely:

- They were all focused on the needs of customers / people they were aiming to serve

- There were high levels of trust between partners

- There was strong hierarchical leadership within the partnership, but members were also able to lead and take action within their own organizations.  The author referred to these as "local public service entrepreneurs"(p28).

The report concluded that in order to achieve the required multiple objectives "customer focus and empowerment, organisational improvement, efficiency", projects needed "to invest in building trust as a pre-condition of joint action, risk-taking and innovation" (p28).

The theme was also present in academic research in the UK.  When considering dysfunctions in partnerships, Entwistle et al (2006,15) found that a dependence on hierarchical and market forms of co-ordination led to rivalry and excessive bureaucracy, along with a lack of trust and reciprocity between partnership members.  Similar conclusions were reached by Williams and Sullivan (2009, 8), in research based on 5 case studies of statutory sector partnerships in Wales.  The authors considered the complex interplay between what they refered to as structural and agential factors of partnership frameworks.  Structure encompasses elements such as external scrutiny, national policy and financial resources, whilst agency encompasses the potential of individual partners for offering leadership, inter-professional working or boundary spanning.  Their conclusion drew on comments from two stakeholders involved in the study (p11):

> "the thing that makes it work in any type of structure is the commitment of the person – structures can be enabling or difficult" (voluntary sector representative)

> and

> "you can have the best, most effective and streamlined structures, but if people can't trust each other, any partnership will fail" (senior health manager)


They concluded that establishing partnerships through structural change alone is unlikely to result in the achievements which policy makers desire, and that consideration must also be given to what they term "agential stimulants", that is to the individual people who make up the partnership.

This theme was found at an international level.  For example in a study of a community-academic partnership aiming to improve health outcomes in an underserved community in Chicago USA, McCann (2010) found that the success of the partnership was dependent on members having sufficient trust and freedom to share resources.  The resources shared ranged from direct and indirect financial resources to information resources, particularly those relating to the health of clients, where a willingness and ability to change working practices was also required.  A further resource was the trust which existed between the community and the

community-based social services agency and which, through partnership working, was then shared with the academic community, leading to "unique and meaningful educational opportunities for Rush University students across specialities" (p 7) as well as improved health outcomes for the community served.  The author went on to suggest that the level of trust between partners may have greater influence on the success of the partnership than the level of more easily measureable resources, such as finance.  In what is described as an "unanticipated barrier", it concluded that the initial unwillingness of the leaders of the community-based agency to openly and honestly discuss its financial deficit was more damaging to the partnership than the deficit itself (p7).  Similarly, in a study of the effectiveness of a partnership-based early childhood intervention project for children living in disadvantaged areas in Victoria, Australia, Kelaher et al (2009) found that the emphasis on collaborative decision-making, shared leadership and action to bridge social ties was crucial to improving service integration and resulted in an improvement in service uptake and integration for the children the partnership sought to serve. A final example is that of a study of a research partnership between Montreal Public Health Department and the City of Montreal Department of Income Security and Social Development (Bernier et al, 2006), which found the development of the partnership framework both complex and marked by tensions as partners negotiated how best to represent their various interests and establish the basis for the collaboration.  As with Callender, this study found that acknowledging different interests, cultures and ways of working, developing trust and mitigating inequalities among partners assisted in the process.   In this, both studies reflected the conclusions of Williams and Sullivan regarding the interplay between structure and agency.

The level to which these framework elements were present varied between the example partnerships reported, and a number of studies, including Bernier et al (2006), highlighted the costs associated with establishing and maintaining such frameworks. Although there was not consensus that specific levels of trust, leadership, flexibility and so forth were needed for partnership working to be successful, there appeared to be consensus that if they did not exist, partnership working was less successful.

The framework elements identified as necessary for successful collaborative or partnership working in the Knowledge Review reflected those suggested in the academic literature.  For example, a report published by the Institute of Volunteering concerning patient and public participation in the NHS concluded that there was genuine commitment on the part of NHS organisation to embed involvement in their working practices.  The report goes on to state that it found that the NHS acknowledged that to achieve this it was necessary to provide adequate backup in terms of training and support, with the result that the public were subject to "the same rules of engagement" as NHS staff (Gay 2005, 3).  As with the academic literature, whilst the existence of such a framework was not proposed as a reason for a collaboration succeeding, the lack of these framework elements was cited as a reason for collaborations not being successful.  A report by the Institute for Voluntary Action Research noted that disputes in the highly regulated Compact agreements between government and voluntary and community sector organizations in England were often the result of a lack of an agreed framework:

> "Lack of awareness of the Compact in public bodies was seen as the main reason for public bodies working in a non-Compact way. This included not knowing that the Compact exists or what its principles are and not understanding the Compact's application. This was the case in both local and national disputes. Many interviewees felt that the absence of sanctions for non-compliance with the Compact contributed to public bodies' lack of awareness since there is little or no incentive to understand and abide by the Compact. "

> (Buckley & McCullough 2010, 11)

A digital story by a Local Authority Champion for Older People outlined how developing a strong framework had been an important factor in the success of the 50+ Forum in Pembrokeshire.  It also drew attention to the need for this framework to encompass and have the commitment of all stakeholders if it was to continue to grow in strength :

> "My journey began in 2004 when I became Pembrokeshire's Older Person's Champion.  Since then, the strategy coordinator and I have been visiting luncheon clubs, associations and older person's forums around the County

raising awareness of the Strategy, increasing membership of the 50+ network and encouraging older people to speak up and be heard.

… We are now well into the second phase of the Strategy and the Assembly Government have made it clear that during Phase 2 local authorities should continue to play the leading role in taking forward the Strategy, but they must have the firm involvement of the Health Service, the Voluntary Sector and more important older people themselves."

(WLGA 2011, 1)

However, whilst items such as this concur with the academic literature, a development which does not appear in the academic literature to date is how changes in the economic climate may adversely affect the ability of collaborations to establish such frameworks.  A report by the TSRC concluded that whilst political support for partnerships may continue, support for it may be hard to deliver during an extended period of recession and that "history may judge the New Labour era to have been a high water mark in partnership between the  state and the sector" (Alcock 2010, 4).  This emerging theme is of particular importance to this research, as it was carried out during a period when both public and voluntary sector organizations were facing significant reductions in their financial resources.

*Power relations*

A second theme related to the balance of power between partnership members. Generally it was accepted that small, community- based voluntary or non-government organizations had less power than statutory organizations, mainly as a result of their having fewer resources and so being less able to attend meetings, less able to participate with confidence, less able to contribute to or control the administrative functions and so forth.  This was especially so when statutory organizations were also the gatekeepers to resources on which voluntary sector organizations depended, and similar disparities in the balance of power were apparent in studies of central and local government partnerships where central government held a gatekeeping role (for example Turner and Whiteman 2006, and Cowell and Martin 2001).  Nonetheless, the balance of power within partnerships

was often seen as fluid and not entirely measurable by the size of a partner organisation's bank balance.

Cunningham (2008, 18), in an investigation of the impact that transactional based voluntary-statutory sector partnerships had on voluntary sector care-providing organizations in Scotland concluded that the relationship between the partners was not one of simple "control and subordination". The study found that the weaker party could, under certain conditions, manage the relationship and exercise influence and autonomy and that the balance of power between the two groups was open to change. A similar theme was developed by Tsasis, in an examination of non-government AIDS organizations working with Health Canada (2008, 19-22). This study accepted that the allocation of power between the non-government and statutory organizations was disproportionate in terms of the resources available to the different members and also because of the gatekeeping role of Health Canada. The study also established that the partnerships lacked some of the framework elements identified as desirable if not essential in other works; for example they did not always share perspectives on how best to tackle AIDS related issues and there were high levels of bureaucratization and requirements for formalization. In spite of all this, Tsasis found that the extent to which the non-government organizations could represent, empower and mobilize their community increased their political strength and consequently their influence within the partnership.

As well as the influence of power imbalances, collaborations can be influenced by individual members having to balance their commitment to the collaboration with other commitments. For example, a collaborative venture may have been established to address the need to improve play opportunities for children and young people living in a specific community area, but a participant representing Local Authority Playgrounds may also have to ensure that there are adequate play opportunities throughout the area, a Police representative may have to balance their resources to meet targets to reduce crime which is not related to children and young people, and a health representative may feel that their resources need to be taken away from play provision in order to support other areas of need. Sullivan and Gillanders' study of the impact of local public service agreements (2006, 26), highlights the need for partners to share targets rather than have them imposed on

them.  However, as noted by Cairnes  in Chapter 1, this process can take time and requires leadership, and so it also requires those individuals put forward to participate in collaborative ventures to be in a position to make decisions on targets.

There was discussion, but not consensus, regarding what was achieved when less powerful partnership members were ensured equal representation through a corresponding loss in framework flexibility.  For example, in a study of early intervention projects for children living in areas of high deprivation in the UK (Hassan et al 2006), it was found that governance arrangements, such as quorum regulations which ensured that parents were involved in Board level decision-making, supported equality in decision-making. Contrasting with this, a study of the "three thirds" principle adopted by the Welsh Assembly Government, which placed a statutory obligation on local partnerships for strictly equal representation for the public, private and voluntary sectors, (Bristow et al 2009, 28), concluded that "it is questionable whether the inclusion of these representatives has progressed representative democracy as much as had perhaps been hoped.  Metagovernance through network design of this form does not in itself resolve the observed problems associated with unequal capacities between sectors ".   Furthermore, this study concluded that imposing such requirements from above for balanced representation was likely to create further problems or cause damage to the partnership framework as partnership members

> "inevitably look upwards to higher decision-making authorities and focus on meeting top down targets and satisfying the accountability and audit trail rather than local needs and priorities. Rigid statutory rules on partnership structures and functions encourage a culture in which partnerships seek to tick the appropriate boxes for process requirements, tasks completed and interests represented rather than achieving meaningful outcomes. It favours partners who are best placed to understand and influence the preoccupations, politics and personalities which hold sway at the centre."

> (Bristow et al 2009, 30)

The study also found that, even within the strict "three thirds" approach, there continued to be local government dominance.  This was often simply because it was the only partner with the resources to attend and service meetings, and so could

have greatest control over what was discussed and agreed.  There was little or no evidence that the "three thirds" principle had resulted in increased direct engagement with grass-roots community groups.  The authors report one individual from a voluntary sector organisation stating:

> "in many cases professionals prefer to operate with 'safe' citizens in partnerships and to recruit these via the voluntary sector umbrella organizations.  This avoids contact with 'untutored' locals who may not grasp the usual 'protocols' of partnership working."

<div align="right">(Bristow et al 2009, 18)</div>

Consideration of the balance of power between professionals and lay members appeared in other studies particularly in partnerships where the lay members were from communities which were generally underserved or disadvantaged.   These studies often referred back to policy proposals advocating co-production along with base line data suggesting that it wasn't happening.  For example, in a collection of case studies of examples of good practice in partnership working and co-production published by the Future Services Network[3] (Day 2006, 3 & 8), reference was made to preparatory research which suggested that only a minority of people (32%) felt that they could influence decisions made by local authorities, whilst the overwhelming majority wished to have greater influence (83%).  This, along with many other studies, drew attention to the fact that lay people are not one homogenous group and consequently methods of engaging and supporting co-production must be adapted to reflect this.

Even within groups of lay people, research highlighted how the individuals who make up a group are not all alike.  This theme was developed by Cargo et al (2008, 8), in a study of the influence of Kahnawake (Mohawk) community members within a schools diabetes prevention project in Quebec, Canada, where the reported prevalence of Type 2 diabetes was twice that of the general population of the same age.  The study findings suggested that the decision-making process was non-

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[3] Future Services Network comprises three partner organisations:  the National Consumer Council, Acevo – the professional body for voluntary sector chief executives – and the Confederation of British Industry

hierarchicial and participatory because of the strong leadership exhibited by some members of the Kahnawake community.  Contrasting with this, an action research project concerned with health care for older people in America (Gallagher et al 2009, 17), experienced a very low initial participation level and a high attrition rate.  When the project reached the final evaluation stage, it was only possible to interview the head of the community centre which was proposed as a base for provision of advice and services for older people, and just one older person.  Both suggested that reasons for these low levels of engagement and co-production were due to the local community being primarily middle-income, with individuals having health insurance and so not being in a crisis situation.  Both also felt that older people may not want to use the centre to discuss serious issues when it was primarily used for socialising and having fun, and also that older people may not want to participate in programmes, even though they would benefit personally from them, because participation may be interpreted as a form of weakness.   These conclusions lead to questions of why individuals (older people in this instance) decide not to engage in the co-production process, even though the professional groups want them to, and many of the individuals possibly have the skills, time and confidence to take on the mantle of "representative" or "leader" if they choose to do so.  Whilst an imbalance in power might mitigate against successful co-production, a lack of success is not necessarily due to a power imbalance.

Power balances formed a major theme in the Knowledge Review, with the same reports of imbalances of power between voluntary and statutory sector organizations being detrimental to successful collaborative working.  The literature also drew attention to the differences in power between voluntary sector groups, and between community members, arriving at similar conclusions as the academic literature that there can be a tendency for statutory sector bodies to select their partners according to their best interests.  A report by the Institute for Volunteer Action Research highlighted the dangers of assuming that the voluntary sector could speak with one voice, and argued that to expect it to do so undermines the diversity and breadth for which the voluntary sector is generally applauded.  The report concludes by returning to Alcock's point regarding the cost of supporting a framework for participation:

"The organisation and management of representation is complex and time-consuming: debates about membership; the challenge of being inclusive; the pressure to achieve consensus; the plethora of meetings and consultations – all of these require time and money. In practice, funding to support the organisation of representative activities and structures is, at best, uncertain and, at worst, unavailable"

(Harris et al 2009, 6)

Even within what some might view as identifiable groups (for example young people) or communities (such as people living in a specific area), reports highlighted that there were differences which should not be ignored.  A Joseph Rowntree Foundation report on community participation within the South Asian community of Bradford noted that:

"Statutory organizations, while hearing from South Asians and from minority identity groups amongst those of non-Asian heritage, generally do not hear from South Asian minority groups, and may inadvertently reinforce social structures that impede these minorities.  Where this is not the case, services rarely have the capacity to maintain appropriate provision. …. Some within statutory organizations assume that people could contribute to neighbourhood-level consultation, regardless of minority status.  In predominantly South Asian neighbourhoods, the research did not bear this out – some minorities face significant obstacles to participation at the neighbourhood level"

(Blakely et al 2006, 1)

Furthermore, a number of authors reported on the damage caused by those in powerful positions within collaborations, ie statutory sector members.  A Joseph Rowntree Foundation report on participation and community on Bradford's traditionally white estates found:

"Senior managers and agencies have unintentionally perpetuated problems through tokenistic consultations, not respecting residents' knowledge and thinking they know what is best for communities.  These attitudes have angered and demoralised residents trying to improve conditions, in turn inhibiting participation.  Policy-makers' proposals have not resonated with the reality of residents' lives nor built on their capabilities"

(Pearce & Milne 2010, 1)

The literature findings of imbalances of power, both between resource rich organizations and lay people, and between individual lay people, suggest that co-production or collaborative action may damage rather than enhance the lives of the individuals that it supposedly seeks to benefit.

*Networks*

Different from but related to power balance was the theme of networks within partnerships, and the impact of external networks on a partnership.  These studies reflected on the wider networks to which some, but not all, partnership members may belong and the influence this had on relationships between partnership members who shared or were excluded from other networks.

The suggestion that the quantity of contacts diminishes as age increases, particularly in the years following retirement, has been confirmed in more recent studies, including those which have considered cultural differences (for example Chen et al's study of household-based support networks in Taiwan (2010) or Fung et al's comparison of network composition among Germans and Hong Kong Chinese (2008)).  However, this does not necessarily mean that the *quality* of support diminishes, to the detriment of the individual's wellbeing.  For example, in a 3 year longitudinal study of over 1,000 men in the USA, Bosse et al concluded:

> "… that the quality of social support does not decline.  Although one may lose family and friends so that the social support network declines, the quality or the perception of support available did not decline over time and did not differ even between long-term retirees and men who continued to work"

> (Bosse et al 1993, 216)

Neither can it be inferred that networks  automatically associate place and role with gender, through women traditionally taking the role of support providers in the inner circle, and men building up large membership of their outer-circle through co-workers and other career contacts.  For example Chen found that:

> "The effects of gender were somewhat mixed.  Traditionally, males have been the breadwinners and females have been the care providers of the family.

Our findings showed that males more regularly exchanged allowances with their parents.  Additionally, males were more inclined than females to provide sick care support for their parents. "

<div align="right">(Chen 2010, 667)</div>

 Entwistle et al (2006, 3), when reviewing the literature on networks suggest that they are a phenomena which definitely exist, have many benefits, but are also extremely difficult to manage or hold to account.  In many instances, external networks were seen as an essential contributor to the success of a partnership, especially in partnerships advocating co-production (for example Fort and McClellan's study (2006) of an academic/community partnership aiming to reduce ethnic disparities in cardiovascular disease and diabetes or Kreling et al's study (2006) of a Latino community primary care/academic partnership) . However the influence of external networks was also seen to present a dilemma to partnership or co-production initiatives which were seeking to espouse a framework based on trust and flexibility. A powerful example of the negative effects of external networks is given in Addicott and Ferlie's study of Managed Clinical Networks (MCNs) for the delivery of cancer services in the UK (2007, 400 & 401).  These MCNs were established by the Department of Health with the objective of streamlining patient pathways and encouraging sharing of good practice and knowledge between the many different organizations involved in caring for people with cancer. They were managed by a small team appointed by the Department of Health; they were not managed or led by any particular MCN member.  The research findings showed that in many instances power was assumed by the medical profession:  "most typically to a dominant sub-group of medical professionals from prestigious and powerful major London teaching hospitals"(339).  Despite the clear objectives of the MCNs, individual's membership of other networks, particularly ones which carried professional dominance (such as being a member of a network of consultants from powerful teaching hospitals) led in some instances to a complete failure to achieve MCN objectives:  for example "Clinicians from some networks reported that the MCN would have to wait until they retired before they would comply with the structural reconfiguration"(400).  This recognition of the influence of external networks is reflected in the body of work concerned with the use of network analysis in the evaluation of partnerships.

This research is concerned with people over the age of 50, and so individuals who are likely to have associates who have moved between their purely social and purely professional networks over time.  Many of these individuals may also have been directly employed or associated with more than one organisation involved with the Strategy for Older People.  This was addressed by Parmigiani and Rivera-Santos in a review of inter-organisational relationships (2011).  The review found that cross-sector partnerships bring together organizations which may have very different goals and approaches to addressing problems as they may have distinctly different stakeholders and different motivations.  These can result in power imbalances which can result in difficulties, although they suggest that relationships "run more smoothly when partners have a long history and have developed trust and when institutional norms have been developed (eg standardized contracts)."(Parmigiani & Rivera-Santos 2011,1119).

A report by the TSRC adopts the term "below the radar" to describe small community groups which lack regular, substantial annual income and, as such, are the groups less likely to be able to afford to become involved in the collaboration process and have members who are less like to be already part of networks outside of their own community or area of interest.  However, the authors also suggest that it is their networks with the communities that more powerful organizations seek to serve that makes them a vital resource:

> "While they share common ground in terms of being led by, and for, their constituents, driven by need, responding to gaps in mainstream provision, sharing common interests, acting holistically and flexibly, using resources sourced internally, a key factor is that they base their actions upon their own distinctive local, and specific, knowledges that can only result from lived experience. They also operate using social networks only available to those who share experience or geography."

> (Phillimore et al 2010, 21, my underlining)

Unfortunately, other reports draw attention to data that shows that these are the individuals and communities who, currently, are least likely to participate in any form of formal volunteering, including voluntary membership of a collaborative venture to develop policy or deliver services.  A report by the Institute for Volunteering Research on voluntary action in deprived neighbourhoods notes that the culture of

voluntary action in these neighbourhoods is more one of helping each other on a one-to-one basis than of joining formal voluntary groups, which the author argues is the tradition of more affluent communities.  The author arrives at a similar conclusion to Phillimore that, by seeking to engage primarily with established voluntary sector organizations where networks are already established, and by seeking to collaborate through the establishment of groups which mirror the traditional voluntary sector framework (for example with constitutions, formal meetings and documentation of decisions and actions), the statutory sector is losing an important resource:

> "The third sector approach that seeks to develop voluntary groups is thus focusing on only one half of current voluntary activity. "

(Williams 2003,13)

This again suggests that co-production or collaborative actions have the potential to exclude the people it purports to engage, should engagement strategies rely on networks which are outside of the places or the activities through which they live their lives.

### *Behaviours or competencies required for successful collaborative working, including leadership, entrepreneurialism and optimism*

A fourth major theme was behaviours or competencies necessary for successful collaborative working.

Many of the studies reflected on the importance of strong leadership, but leadership which was adapted to circumstances where the leader did not have authority to compel members to take action, for example Ford et al's writing on a leadership development programme for directors of nursing in older people's services in Ireland (2008). The article outlines how, in a context of organisational reform based on a move away from a fragmented approach to health care to a more integrated and co-ordinated approach, the Nursing & Midwifery, Planning & Development Unit developed a programme which connected the clinical leadership role of nurses with the "context of contemporary policy, practice and demographical challenges and opportunities" (p3).  The article asserts that "nurses, as the largest

workforce within health and social care and with positions which span across the organization from the bedside through to ward leadership and management to the executive board, are crucially placed to really make this *(ie the required changes)* happen" (p161).   The decision to invest in this programme was an acknowledgement of the leadership behaviours or competencies required to achieve an integrated and co-ordinated approach to health care.  The resulting leadership development programme, with its emphasis on partnership working, identifying and negotiating with stakeholders, and engaging support from external agencies can be compared with the concept of the "servant leadership" model, adopted as the expected leadership style by many successful private sector organizations and described by Robertson and Henderson (2006, 13) in research commissioned by the Cabinet Office for the Public Services Leadership Consortium.  However both these works, as well as promoting leadership as a competency required for successful collaborative working,  also reflect aspects of the themes discussed earlier concerning the frameworks required for successful collaborative working, including the need for what Callender referred to as  "local public service entrepreneurs".  Consequently the question arises, does the framework which includes "local entrepreneurs" lead to the need for members with those competencies, or does the presence of members with such competencies lead to the development of collaborative frameworks where individuals are able and even encouraged to behave in an entrepreneurial way?

Together with studies concerned with the competencies required of hierarchical leaders were studies concerned with the competencies required by what has been termed "boundary spanners" (Sullivan & Williams 2007, 50 - 52), that is partnership members who do not hold senior positions within the hierarchy of the partnership, but have a form of leadership role through their contribution as advisors, motivators and facilitators.  Although the holders of this role may not have  hierarchical authority or status, the skills required for the role appeared very similar to those of hierarchical leaders, including strategic management, organisation, negotiation and networking.  As noted previously, possible publication bias may be the reason why the vast majority of writings on boundary spanner roles dwelt on the achievements resulting from the existence of such a role within a collaboration, and evaluations in particular made reference to the support, vision and encouragement such roles

provided.  An interesting balance to these are the conclusions of a study by Hibbert et al (2009, 10) that whilst the holders of such roles were clearly determined in their efforts to make a collaboration work, they were also optimistic or gave a pretence of optimism, sometimes providing "optimism to the collaboration despite secretly sharing the more negative opinions that were present in the partnership more generally".  The conclusions come close to suggesting that for any collaborative venture to be successful, there needs to be someone who can behave with unbridled optimism, or at least be reasonably competent at giving the impression of unbridled optimism as they lead the collaboration towards its goal.

Flexibility and respect were also viewed as necessary components to successful collaborative working, both as components of the required framework and as behaviours of individual members.  However from the studies viewed, it was difficult to judge whether flexibility and respect came or was withheld because of the behaviour or competency of an individual or because of the culture of the organization they represented, especially as individuals may have been attracted to an organization in the first place because the culture of the organization matched their personal preference.

The strength of the conclusions in the Knowledge Review concerning frameworks and power, underlines the consequent conclusions in the themes of behaviours required for successful collaborative working, the legitimacy of collaborations and how best to evaluate collaborative ventures.  Without this framework and without members with the necessary skills and competencies, it seems unlikely that an evaluation of the collaboration's work can include the views of those it seeks to serve, and so the value of the evaluation will also be limited.


*Legitimacy*


The legitimacy of partnerships, in particular those involving members who were not democratically elected, was an emerging theme in academic literature published from 2010.  In research questioning whether public sector managers in the UK  felt networks enhanced democracy, Jeffares (2010) identified 4 distinct groups, ranging

from those willing to use their (possibly unelected) networks to complement the process of democracy to those who viewed their networks as a useful tool for getting things done and were not concerned with democracy. In their overview of literature on co-production in public services (Loffler and Bovaird 2010, 19), attention was also drawn to the challenge of avoiding the development of co-production collaborations based on "individualistic approaches, where more assertive users tend to benefit most from their relationship with the state". Based on a review of literature concerning concepts of legality, democracy and performance, Damme (2010) observed that an increasing number and diversity of mechanisms of consultation and participation have been introduced into the policy making system in order to increase overall policy legitimacy. However Damme concluded that the contribution that these consultation and participation mechanisms make is unclear, and furthermore their introduction has led to the whole policy making process becoming more complex and less transparent as the different mechanisms compete with each other. Together, these papers question the entire concept of collaboration and co-production being "a good thing".

Questions of legitimacy appeared to a greater extent in the knowledge review, although as with the literature review, these questions were closely associated with questions of partnership structure and power balances. In essence, many authors reported decisions on the selection of collaboration members being based on convenience, sometimes born out of necessity and sometimes born out of ignorance. This was apparent in the reports of the importance of personal networks that ran alongside the theme of balances of power. In a study of relationships between 26 organizations representing 13 collaborations between small and large voluntary organizations, the Institute for Volunteer Action Research identified a range of common characteristics, notably:

- most of the organizations which formed partnerships had worked previously and already had detailed knowledge of each other

- the most significant cost to organizations was staff time

(Schlappa et al 2006, 1-2)

The sample organizations used for this study were involved with activities ranging from campaigning to specialist support for individual service users, and so these organizations were speaking or acting on behalf of others. Whilst the report notes a range of factors which contribute to the effectiveness of the partnerships, including strong inter-personal relationships and complementary skills, no reference is made to whether the members had any basis to claim to be the legitimate voice of the groups they claimed to represent.

Blakely's study mentioned earlier, of participation structures within South Asian communities in Bradford, considers the question of how identity - in terms of background, life experiences, caste, age, religion, gender or sexuality - affects people's ability to voice their concerns. Their research concluded that statutory organisation did not give sufficient attention to "the diversity within or representativeness of those communities of interest" (2006,15). The study draws attention to the existence of groups within groups, and of the challenges facing what it terms "minorities within minorities" to have any voice at all.

The literature concurs with that of the academic literature that a framework is necessary for any form of partnership working, but highlights how factors such as the economic climate are hindering the ability for such frameworks to develop, particularly as the framework is likely to require investment so that members can develop the required behaviours or competencies to support it. Without this framework and without members with the necessary skills and competencies, it remains difficult for people who are not part of established networks to become involved in the collaborative process. Consequently the legitimacy of these collaborations, and the legitimacy of the individual lay members who claim to represent others, is open to question.


*Drivers and Motivation*


Why lay people are motivated to become involved in co-production or collaborative ventures did not appear as a theme within the academic literature. However, older people's involvement in planning and implementing the Strategy for Older People in

Wales is a voluntary activity in as much as there is no compulsion to become involved and there is no remuneration for doing so, and there is a rich collection of literature concerned with why people decide to participate in voluntary activity, working alone or with others for no monetary gain.

The literature concerning motivation of older volunteers is not as great as that for some other groups, but the studies which exist indicate the range of differences in motivation factors among older people.  In a quantitative study of the relationship between age and motivation among older volunteers in the USA based on the Volunteer Function Index (VFI, detailed in Chapter 4) , Okun and Schultz (2003, 231) found that whilst motivation to volunteer in order to meet social functions increased with age, and motivation to meet career and understanding functions decreased. However the study found that age had no influence on motivation to meet the remaining functions (values, protective and enhancement).  A study by Lie et al (2009), which was based on in-depth qualitative interviews with older people living in the North East of England rather than quantitative surveys using a VFI, reached similar conclusions that older people involved in volunteering obtained social rewards:

> "the heartfelt satisfaction of contributing and feeling a part of the community, as well as the freedom they enjoy in being able to do so"

> (Lie et al 2009,13)

There was not clear evidence that increasing age brings with it an automatic wish to contribute to the good of future generations, as suggested by Erikson's theory of generativity (Chapter 5 refers).  In a study of well-educated members of voluntary community educators in America, Kleiber and Nimrod found that

> "To some extent, as with many other voluntary, discretionary, or leisure activities, it was less a matter of what one was doing than with whom it was done."

> (Kleiber & Nimrod 2008, 8)

Furthermore, there was evidence that the recently retired or preparing for retirement "Baby Boom" group, who have very different early life experiences from those who have been retired for 20 years or more, may have little inclination to give their time to benefit future generations. For example, interviews with employed women preparing for retirement in Canada found a determination to resist commitment and reject the traditional values of and virtues in volunteer work:

> "… the women in this study are adamant; they will maintain their quest for freedom, flexibility, and lack of commitment. Any volunteering done in retirement will be considered as deliberate leisure"

<div align="right">(Seaman 2012, 252)</div>

Recent studies have highlighted differences in motivation between cultures and countries. For example , Principi et al (2012), in a study of motivations of older volunteers in three European countries (Netherlands, Germany and Italy), concurs with Okun. However, the study found differences between countries, for example altruistic motivations were more important for German older volunteers than Dutch or Italian. Similarly, Ho et al (2012), in a study of older volunteers in Hong Kong, also found that social motives increased with age, whilst career and understanding motives decreased. However, the study found that value motives increased with age. They reflect that this endorsement of higher value motives may reflect a greater desire to show care and concern to other people, and conclude that:

> "The fact that the relationship between age and value motives was found in our Hong Kong Chinese sample, but not in Okun and Schultz (2003)'s American sample, highlighted the importance of conducting cross-cultural studies to determine whether some age differences in volunteering motives might be culturally specific."

<div align="right">(Ho et al 2012, 325)</div>

In a study using data on people aged between 50 and 84 years old collected on over 10,000 men and 13,000 women in Denmark, Germany, Greece and the United States, Komp et al found that the direct influence of age and any associated declining health on volunteering is negligible, and that their findings:

> "disqualify age as an indicator for volunteering in later life. The direct influence of age is negligible and the age patterns created by retirement and declining health are weak. Moreover, no influence of age singles out an age

group of particularly active older people.  Even when we combine the age patterns created by retirement and declining health, such identification fails"

(Komp et al 2012 , 293)

Other studies suggest that individual experience, values and preferences have more influence on the decision to volunteer than chronological age.  In an examination of the participation in volunteering by public and non-profit employees  based on Current Population Survey data in the United States, Lee(2012) found that:

> "public and nonprofit workers volunteer at a higher rate than for-profit workers do … nonprofit workers are more likely to volunteer than public workers for religious and social community organizations.  Public employees are not different from for-profit workers in terms of volunteering in social and community organizations.  However, government workers are more likely to volunteer in educational organizations than employees in the nonprofit sector and in the for-profit sector"

(Lee 2012, 114)

In a study of the incentives and barriers to volunteering by Australian seniors, Warburton et al (2007) found that people were most likely to volunteer for an organisation if they already knew someone doing so (350).  They also found that non-volunteers rated barriers to volunteering as more significant than volunteers, suggesting that these barriers may be more perceived than actual, based on lack of experience of volunteering (352).  Similarly, Suanet et al (2009) in a comparison of 55-64 year olds in Amsterdam in 1992 and 2002 found that the more recent group were about one fifth more likely to volunteer than those in the 1992 cohort, explained in part by increased education levels.  The study also found that, while older adults may have

> "a stronger inclination towards volunteer work from their youth due to religious involvement, education level and volunteer work of their parents, it is more important that they have a high level of education and practising church membership themselves"

(Suanet etc al 2009, 164)

It cannot be concluded that all older people benefit from participating in volunteering, anymore than it can be concluded that all people benefit from participating in volunteering.  A review of articles concerning the possible benefits of volunteering on

older people's quality of life carried out by Cattan et al (2011) concluded that the benefits reported by those older people who participate in volunteering should not be ignored (such as gaining a sense of control, feeling appreciated, having a sense of purpose and being able to "give something back"), but that:

> "there are still major gaps in our knowledge regarding who actually benefits, the social and cultural context of volunteering and its role in reducing health and social inequalities. The positive impact of volunteering on depression in older women and in older people with dual sensory loss seems fairly convincing. However, it is possible that mainly people with a positive past experience of volunteering chose to volunteer in later life."

> (Cattan et al 2011, 331)

Finally, it must be recognised that "volunteering" is not a single type of activity, there are many different forms of volunteering and an activity which is attractive to one person may not be attractive to another.  In the same way that a person's motivation to volunteer may have more to do with their education, their previous life experience or their country of birth than with their chronological age, so too may their motivation to volunteer for one activity rather than another.  Barnes et al (2012), attempt to address the question of "who takes part" in public participation in governance and service delivery, through a study of members of 2 Senior Citizens forums in the South East of England.  Their work tended to reinforce a view that this form of voluntary activity attracted older people who were fitter, wealthier and better educated than many.  Their findings also concurred with Principi and Ho with regard to the influence of culture and place, concluding that "The way in which such issues are explored also reflects particular local cultures" (278).  However, they found that forums were not simply places where people who were already in powerful or privileged positions could promote their own interests.  Rather such forums were places where:

"older participants can explore the diverse meanings and experiences of ageing and what this implies for the roles of such forums in relation to older people in general. Conflicting tendencies are evident: to create distance from 'other' less-active older people, but also to develop solidarity across lines of difference amongst older people; to focus on 'age-specific' issues and also to emphasise cross-generational interests in creating environments in which people can age well"

(Barnes et al 2012, 278)

The theme of why people are motivated to volunteer their time and energy to work with others to achieve a common aim was apparent in the Knowledge Review. Of the 28 data sources within the Knowledge Review which addressed this theme, the majority were major reports produced by the Joseph Rowntree Foundation (n=11), where the main source of knowledge was people who used services. All other data sources addressed this theme, with the exception of SCIE and IVAR.

A study by the IVR based on a survey of almost 20,000 residents living in communities selected for regeneration under the governments "New Deal for Communities" (NDC) initiative[4] found that, although the initiative aimed to increase community participation, only 11% of residents participated in their local NDC programme and only 12% had undertaken any voluntary work at all in the previous 3 years (Hickman & Manning 2005, 48 & 49). The authors suggested a range of reasons for this low participation rate, including that it takes considerable time to develop effective community participation (50) and that a willingness to participate is linked strongly with a sense of trust in the venture and/or the lead organisation, the extent to which residents feel part of the community and how many people they know locally (51). Unlike the studies outlined above, this study found that age was an influencing factor, with people aged over 65 being the most likely to participate (53). However, the study did not consider whether it might have been because of a link between age and "positive past experience of volunteering", as suggested by Cattan.

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[4] UK Government National Strategy for Neighbourhood Renewal, primary purpose to "reduce the gaps between some of the poorest neighbourhoods and the rest of the country". (Communities and Local Government 2010, 13)

A similar study by Involve, based on data collected from a review of public participation ventures carried out by 16 national bodies concerned with a wide range of public services, suggested that there was a strong link between motivation and previous experience.  The study concluded that 78% of the public wished to be involved in making decisions on local and on national issues (Burall & Shahrokh 2010, 9).  However people were discouraged from participating, not because of the complexity of the issues to be considered, but because of the complexity of the mechanisms for interaction, communication and engagement, the lack of feed-back on the results of decisions made, and a lack of trust in the public's ability to make decisions.

> "I felt like at the end there was a bit of an overload where I felt like everyone had been rounded up and directed towards a resolution that would please the Government.  I felt the whole day was designed to do that"

> (Participant interview, Burall & Shahrokh 2010, 10)

In an evaluation of initiatives to promote community participation in the government of services in 2 deprived neighbourhoods, a Joseph Rowntree Foundation report found common characteristics in accounts of those actively involved in the governance of each community:

- the insiders as an elite: the same small group of people were involved in a disproportionately large number of governance structures.
- one thing leads to another: membership of one body led to joining another body.
- it's who you know that counts: participants' involvement in governance was mediated through the people they met.
- participation begins close to home: the first step into governance was often with the institution nearest to people's hearts.
- an end to illusions: an ambivalence towards governance, and frustrations at the difficulty of engaging others, were offset by a belief in having their say.

(Skidmore et al 2006, 22)

Consequently, although the report found that people living in deprived communities were motivated to collaborate and participate with each other ("As one of our interviewees put it: 'People already congregate in school, church, at the bus stop'", Skidmore et al 2006, 49), it was a specific, identifiable group who were motivated to collaborate and participate in initiatives organised by statutory and established voluntary sector bodies.  As with the findings of many of the authors referred to above, the problem was not that lay people are not participating, it was that they are not participating within the framework chosen and established by their (more powerful) potential partners.  The authors of the report conclude that, for collaboration to be successful, attention should be given to finding ways of capturing the motivation that already exists, rather than generating a motivation that does not exist and is unlikely to ever do so:

> "For, by itself, the existence of a community elite is not evidence that policies to promote community participation have failed. The existence of a community elite disconnected from local civic culture is. What is worrying is how much attention is paid to creating formal structures that, in all likelihood, will only ever be inhabited by the committed few and how little attention is paid to ensuring that these structures interact with, and are embedded in, the places and organizations in and through which people actually live their lives. As we have seen, this cannot be left to chance.  So, rather than ignore the role of elites, we should draw attention to it and ask how it can be aligned both with existing representative structures, like local authorities, and with these much more informal forms of participation in mutually invigorating ways."

(Skidmore et al 2006, 49)

This conclusion is of particular relevance for a co-production initiative such as the Strategy for Older People, which seeks to engage with a very large and diverse group of people.  It suggests that a reliance on formal structures will only engage with more affluent older people, and that investment in these structures, to the detriment of alternative approaches to engagement, may increase the alienation of the very people the Strategy aims to serve.

## Research questions

For the purpose of this research, it is proposed to consider the community covered by the Strategy for Older People in Wales (Welsh Government, Phase 1 2003-2008, Phase 2 2008-2013, Phase 3 2013-2023).  The introduction to the Phase 2 document states that the Strategy:

> "challenges discrimination and negative stereotypes of ageing and celebrates longer life as an opportunity.  A core feature of the Strategy is its emphasis on the engagement, participation and empowerment of older people.  Our key aim is to ensure equality and dignity and identify ways of remedying the unfairness that is often experienced in later life"

> (Welsh Government 2008, 5)

The research seeks to address the following questions:

- Does the balance of power within co-production initiatives for older people in Wales govern and/or limit the approaches (or rules of engagement) adopted?

- Do existing approaches to co-production exclude many older people, leading to decisions which are not legitimate and to outcomes which are unjust and not inclusive?  If so, how could this be overcome?

- Given the proportion of the population that the Strategy covers, do attempts to achieve co-production with a community which those in power have termed "older people" challenge anti-social norms, or do such attempts reinforce and perpetuate them?

The question of power imbalances seeks to consider whether more powerful organisation are concentrating on formal structures and therefore electing to co-produce only with what Skidmore calls "community elites", to consider whether these structures or frameworks require co-producers to have already developed skills or whether the frameworks allow people to work in an entrepreneurial way, developing such skills in the process.  As the research has been carried out during a period of economic austerity which has damaged the financial resources of established

statutory organizations, voluntary groups and individuals, it will also seek to address questions unanswered in the current literature regarding the impact of financial cuts on partnership frameworks. The question of approaches to co-production excluding people will also draw on the literature regarding power balances between statutory groups and lay people, as well as the power balances between people often identified as being members of the same group or community and the potential damage of tokenistic consultations initiated by more powerful groups. It will build on the literature relating to motivation, networks and legitimacy, giving further consideration to suggestions that co-productions' reliance on established voluntary groups excludes many people and so undermines the legitimacy of a co-production outcome.

The final research question of whether attempts to co-produce with "older people" challenge or reinforce and perpetuate anti-social norms arises from the literature on motivation. The literature indicates that the reasons why any person, regardless of age, should be motivated to engage with voluntary action are complex. Furthermore, motivation factors to engage with action based voluntary action are frequently different from factors motivating engagement with committee-based voluntary action, such as the motivation to join a 50+ forum. Literature findings of differences in motivation between the "baby boom" generation and their older counterparts, and of differences between people of different cultures challenge the rationale of a "Strategy for Older People" with its suggestion that all people over the age of 50 can be identified as a single group. Gaps in the existing knowledge of whether voluntary activity has benefits for all "older people" also challenge the presumption that all people of the age of 50 will or should be identified as potential volunteers who will benefit from the process. The existing literature finding that older people are motivated more by a desire to meet social functions than career functions is juxtaposed with the literature finding that many co-production actions rely on formal structures which would meet career functions rather than social functions. This raises questions of whether any lack of engagement resulting from this juxtaposition reinforces and perpetuates a perception of older people as being difficult to engage or requiring additional support in order to function in co-production activity to the same level as their younger counterparts.

These research questions take account of recent reviews of development in co-production internationally, and across service user / co-producer groups; for example that of Loffler and Bovaird (2010, Appendix 2), which concluded that research is needed from the point of view of personal co-production and community co-production.  They also take account of the conclusions of Barnes (2005, 256-58) that "if older people's participation is to make a real difference this will involve transforming the way which issues affecting their lives are thought about and discussed".

In essence, the research aims to address the question posed by an older person responding to the Interim Review of the Strategy for Older People in Wales:

> "Is it a sublimation of our anger?... Is this a means of saying, we'll direct them into the 50+ forums so that they can have a chat there and get rid of all their anger and it really won't impact on us"

<div align="right">(Porter et al 2007, 38)</div>

# Chapter 3 – Design and Methods

## Introduction

The research questions have an overall objective of understanding the process of collaborative and co-productive ventures.   A quantitative approach, for example adding up how many people responded that they felt engaged in a meeting, would not lead to an understanding of why this was so.  Questions of "how" and "why" cannot be answered adequately through quantitative research methods, and require a qualitative approach (Symon & Cassel, 1998).  However, selecting a suitable qualitative methodology has been as demanding as undertaking the literature and knowledge reviews.

The success of inter-organisational collaboration is influenced by the power and the priorities of the organizations involved, but it is also influenced by the individuals involved.  A representative of a resource and influence rich organisation, who is totally dedicated to the work of the collaboration but has no authority within their organisation, will contribute little to the collaboration's success.  Similarly, a representative who has authority but no commitment, will also contribute little.  Public policy-based inter-organisation collaborations have the added dimension of members who may not represent any organisation and so have no inherent resources or influence.  Furthermore, the reasons for their selection to membership might be unclear and their legitimacy open to challenge.  As identified in the literature review, the selection may be within the control of powerful statutory sector groups, who may choose lay individuals who match their preferences and not necessarily those of the communities they are supposed to represent.

This research aims to consider both inter-organisational collaboration and inter-individual collaboration, because the success of collaborations to implement public policy is affected by both the organizations involved and by the individuals.  Selection of research methods has needed to ensure that data collected take account of both these dimensions.  Consideration has also needed to be given to the circumstances and the previous experiences of individuals; recognizing that not all

people have the skills or confidence to engage with some data collection methods and that methods can exclude some people simply by not being used or usable in the places where they live their lives.

## Deciding how to find the answer

The literature and knowledge reviews gave reassurance, as it was clear that these challenges had been faced by many other researchers who wrote of trials in the form of pilot studies, and trials in the sense of tribulations and ordeal. Whilst acknowledging that engagement presents challenges, Cheston et al write of a "vicious circle of dependency" being reinforced if significant people around a person with dementia do not expect them to provide direct feedback, with lowered expectations leading to lowered performance and high dependency. (Cheston et al 2004, 478). Beresford expresses concern that where user involvement is a requirement of research funders, it can be treated as a "box ticking" exercise and seen by some as a nuisance rather than of any real importance (Beresford 2002, 102). For many, typical research methods have become viewed as a barrier to involvement in the research process. For example Barnes et al speak of deliberately not using surveys, interviews or focus groups when researching women users of mental health services because they "wanted to enable them to be active, contributing experts rather than passive recipients and be able to tell their stories in a way that made sense to them and in an environment in which they felt comfortable" (Barnes et al 2006, 335). However, endeavoring to share the research process rather than control it can lead to matters going awry. Huxham and Vangen write of design choices in action research, a method which requires intervention and so engagement with the research subject. They describe in graphic detail one case where, whilst the project as a whole may have been reasonably successful, there were episodes which were "distressing and unsatisfactory for all concerned" as participants arrived late, left early, challenged the value of group sessions and generally did not engage with the process. This led to problems in interpreting data and drawing theoretical conclusions (Huxham & Vangen 2003,392). On reflection, they conclude that this could have been for any number of reasons, including organisational politics, and may not simply have been due to the way that the

research had been carried out.  Nonetheless, the experience illustrates the risks inherent in design choices which move away from dependency and passivity.


## **Piloting research methods**

As well as taking part in the Postgraduate study skills programme at Bangor University, I attended 3 British Academy of Management Doctoral Symposia, which included workshops and seminars on research methods.  I also attended BAM Special Interest Group seminars on Personal Construct Theory and Network Theory, and a National Centre for Social Research seminar on Framework Analysis (Appendix  3).  My PhD was carried out on a part-time basis, and my continued paid work provided opportunities for me to try out different research methods.  Two freelance assignments which were particularly useful were a WLGA-commissioned work giving examples of best practice on implementation of the Strategy for Older People (WLGA 2009), and an evaluation of the implementation of the Strategy in Flintshire (Jehu, Ll.M. and Rowland-Jones, R., 2009).

### *WLGA "Showcase"*

Data for the WLGA work  were collected through telephone interviews with all 22 Local Authority Older People Strategy Officers, supported by documentation they supplied.  Although interviews were not in-depth, the data collected illustrated the variance in approaches to working in partnership with older people across Wales.

### *Flintshire Evaluation*

The second work was commissioned by Flintshire Older People's Partnership Network.  This was a multi-agency group, chaired by a representative of the Local Health Board and included representation from 50+ forums.  The research was deemed necessary because of the individual nature of the area:  the lessons learned in All Wales evaluations may not apply to Flintshire.  The Welsh Institute of Health and Social Care (WIHSC) had carried out a Review of Flintshire Older People's Forums in August 2006 (Warner, M. 2006).  This had provided a range of

recommendations which had been implemented.  However, the Review was not in-depth, being based on interviews with 14 people, the majority of whom were either Officers in statutory or voluntary organizations or County Council Members. Consequently a number of older people felt that they had not been given an opportunity to be listened to and challenged the findings and recommendations.

### *Developing the pilot research programme*

Following a literature review and interviews with people who had a broad overview of the subject, including the Commissioner for Older People in Wales and the Welsh Local Government Association (WLGA), the research questions and methodology were discussed and agreed with the Partnership Network Core Group.  Although they were the minority, the Core Group included lay members and so there was some opportunity for older people to influence this stage. It should also be noted that although the Partnership was chaired by a representative of the Local Health Board, there was no requirement to gain any form of ethical approval for the proposed method. The agreed methodology was a combination of semi-structured interviews with people involved in implementing the Strategy at a strategic level, including older people who were involved in forums, focus groups with staff and older people involved with projects at an operational level, and observation.  Some observation was open, such as through attendance at forum meetings and events.  Observation was also not open, such as through using public transport and community facilities. Finally it was proposed to analyse the data collected partly through initial coding using NVivo software, and partly through a workshop based on action research principles, involving lay older people, Officers and Members.   Guidance throughout the research project was provided by Professor Robert Moore, Honorary Senior Fellow at Liverpool University School of Sociology and Social Policy, who fortunately is also a "resident older person" in Flintshire.  Advice on the use of action research was given by Professor Chris Huxham and colleagues from University of Strathclyde Business School (Huxham & Vangen 2003, Huxham 2003, Eden & Huxham 2006)

*Pilot Results*

The interview programme was arranged and implemented with relative ease. Far more interviews were carried out than had been possible with the WHISC study and many participants, particularly lay older people, expressed pleasure that they were being given an opportunity to contribute.

The planned focus groups did not take place. In the case of those for Officers/Staff working at an operational level, this was because it was not possible given their other time commitments. In the case of lay older people, it was for various reasons. As noted above, Flintshire is a rural area and so it can be difficult for anyone without a car to get around. For people who are also frail or disabled, this becomes even more difficult. It is also possible that such an event, bringing together people who do not otherwise know each other, did not appeal to potential participants. As an alternative, I attended events associated with Strategy projects, observed what was happening and chatted with (rather than interviewed) the older people attending. It could be suggested that this was not as productive as a specially arranged focus group, but it did generate useful data. In many ways, this experience reflected that of Barnes, allowing older people to "tell their stories in a way that made sense to them and in an environment in which they felt comfortable" (Barnes et al 2006, 335).

The use of observation, particularly whilst using public transport and community facilities, generated a mass of data which contradicted some of the data obtained through interviews and highlighted areas of achievement of which Strategic level Officers were either unaware or ignoring. It was apparent that public transport provided far more than a transport link and, in many cases, provided a "social meeting point" in itself. Observation led to the accidental discovery of an internet café, funded through European grants to promote skills for young people, which was well used by older people both as a café and as an ICT resource. Similarly, observation led to the discovery that Flintshire has a comprehensive programme of walks led by volunteers, trained and supported by the WAG "Walking your way to health" programme. Almost all of these volunteers are over 50, as are the majority of the participants. Neither the internet café nor the walking programme were mentioned in the interviews with strategic managers, and were not mentioned in monitoring or evaluation reports. All of these programmes, including the provision of

free public transport, made a significant contribution to the achievement of the Strategy objectives of promoting social inclusion, promoting health and wellbeing, and ensuring understanding and respect between generations.

The final workshop was a whole day event. Forty four people attended, 30 of whom were lay people over 50, with 4 statutory sector representatives and 10 voluntary sector representatives. The event was held in a community building which had an excellent reputation for its catering, especially its cakes and puddings. Lunch was provided, along with other refreshments throughout the day, and people were able to claim back the cost of travel. Although it was not the only reason for people attending, many people praised the decision to hold the event at a venue which was easily accessible, familiar, and known to provide good food. I was supported by another facilitator, who took notes and helped with exercises. Participants worked in groups, discussing various groups of coded data which were presented on piles of yellow cards placed on each table. Initially participants were asked to cluster these into themes or key messages, thereby considering and challenging the initial coding. Some found this confusing at first and so the assistance of a second facilitator was appreciated. This led to some minor changes in the original coding structure. It also led to the generation of more data as people added their own views and experiences. In particular, additional data regarding people's fear of suffering abuse and losing respect was highlighted, with participants sharing experiences which had not been raised during individual interviews. More lay people attended this event than any previously organised to discuss the Strategy. However, there were clear examples of older people who were technically lay people but who had experience of public meetings and consultation events, dominating discussions.

Finally, working with the older people who were members of the Core Group allowed narratives to develop over time, with conversations starting at one meeting and continuing at a later date. The informal time spent around meetings, including when sharing car journeys or walking between meeting points, allowed people to add to or develop points which they had made earlier. This use of "mobile methods" provided time and space to open up or withdraw at will, giving time for reflection and deepening understanding in a way similar to that described by Ross et al in their work with young people in care (2008).

## Choosing a methodology for this research

The method used for the WLGA assignment, which was determined by cost and time limitations, highlighted the weaknesses of reliance on a single data collection method, of interviews which are not face-to-face, and of collecting data from a single source. The published document was titled "From Strategy to Outcomes: A showcase of local authority implementation of the Strategy for Older People in Wales", and the title is accurate. It could not be suggested that the document reflects the experiences or views of older people.

The mix of research methods used for the Flintshire evaluation, together with the range of people interviewed, had generated a depth of data specific to Flintshire which was far greater than that of previous studies. The methodology also engendered approval from lay older people, with many saying that they were pleased to be given an opportunity to "have their say". The action research event was useful for the purpose of the evaluation, in terms of analysis, of generating further data and of promoting ownership by older people. I felt it would not be a suitable method for use in my PhD; the partnership working which was useful for the evaluation may make it difficult for me to reach my own conclusions for a PhD thesis. However, the challenge that the action research event provided for my original choice of coding structure highlighted the importance of ensuring that the coding and analysis of my PhD data was subject to rigorous scrutiny by my supervisors.

The experience of carrying out the evaluation led to my decision to collect data through semi-structured interviews, and observation. Using subject headings rather than direct questions and allowing conversations to meander had often provided data that was of greater relevance than that obtained through the pre-set areas. Observing people, both at meetings and in community settings, also generated unexpected data or raised new questions.

My experience of observing people in community settings, my lack of success in organizing focus groups, and the high attendance at the workshop, confirmed my decision to seek out people who were not members of 50+ forums, in settings and during activities which they had chosen. This, along with the reported findings of

Ross et al, informed my decision to broaden the period of time over which I would collect data, spending time with individuals so that their story could develop and allowing more than a single opportunity for them to describe an event or reflect on an experience.

Finally, I decided that I would not collect data from all stakeholders. Specifically, I decided that I would not interview or otherwise collect data from representatives of the Council or CVSC, I would only collect data from lay older people. I did decide to hold semi-structured interviews with the current and former Welsh Government Ageing Strategy Managers to deepen my understanding of the implementation of the Strategy on an All Wales basis. However I deliberately did not seek their views on how the Strategy was being implemented in the geographic area of my research.

This decision could be viewed as a weakness in the research design. For example, Pawson & Tilley state that:

> "evaluators need to engage in a teacher-learner relationship with <u>program policy makers, practitioners and participants</u>. These stakeholders clearly have an insider understanding of the programs in which they are implicated and so constitute key informants in the research process."

They also point out that:

> "<u>there will be limitations to the understanding of any particular group of stakeholders</u>, and the evaluator needs to be attentive to the unintended consequences and unacknowledged conditions of their decisions."
>
> Pawson & Tilley 1997, 217-218, my underlining

I had a number of reasons for making this decision.

Firstly, the literature and knowledge reviews had both identified imbalances of power between lay people and established statutory and voluntary players in co-production activity. I accepted that there would be limitations to the understanding of lay people. However, I felt that because of these potential power imbalances between lay people, the CVSC, Council and Welsh Government, it was unlikely that all

stakeholders could have commented, clarified and refined key ideas in equal measure.  The potential power imbalances between the various stakeholders may have resulted in the voice of lay older people being lost to those of more powerful stakeholders.

Secondly, although I am an older person (ie I am over the age of 50), I was conscious that my identity as a University PhD student may separate me from the cohort of lay older people.  Stephenson et al report the influence of the researcher's gender when gathering data from older people, finding that when interviewed by women rather than men, older men devoted much more of their interview to discussing families.  They conclude that "some of the findings in the literature on independence, aging, and gender may stem from systematic, unacknowledged interviewer gender bias (1999, 398).  I believed that a similar interviewer bias might arise as a result of my identity as a University PhD Student.   My status as a professional person rather than a lay person may influence how other professional people, such as representatives of the CVSC, Council or Welsh Government, relate to me.  Their responses to questions, and even their willingness to meet with me to answer questions, may be different from their responses to similar questions and requests from lay older people.  I was interested in the responses and the answers that lay older people received, not the responses and answers that may be given to me as a PhD student.

Thirdly, from the literature review it was apparent that policy makers and practitioners within the statutory and voluntary sectors were already engaged in research to a greater extent than lay people (fig 3 refers).  Furthermore, it was not unusual for research which aimed to assess citizen engagement to collect data only from policy makers and practitioners (for example Guarneros-Meza et al, 2009).  Even in those studies where lay people had been involved, it was often the case that the lay people had been selected for inclusion by policy makers and practitioners.

*Fig 3: Initial literature review – sources of data*
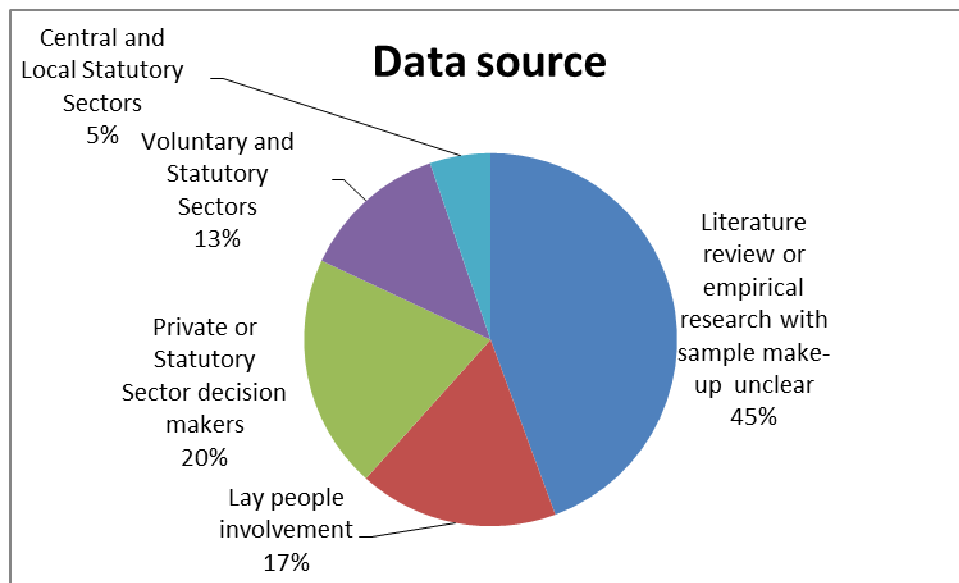


To some extent I agree with Pawson & Tilley and believe that the lack of a voice from any co-production stakeholder has to be acknowledged as a weakness in the research design, leading to a need for further research which involves the missing voice.  However I felt that space could be found in the literature canon for a work based solely on data collected from participants, in this case lay people over the age of 50.

## Data Collection

Data were collected in a semi-rural area, some distance from the administrative centre of Cardiff.  The geographic area selected for data collection was chosen partly for convenience.  I also asked the original Welsh Government Ageing Strategy Manager for advice on area selection, and he suggested that the one chosen would be suitable because it had some good examples of engagement practices, and no more challenges than most other areas of Wales.

*Sample*

Any research concerning the Strategy for Older People presents a number of dilemmas.  Although the Strategy covers all people over the age of 50, they are a very diverse group.  Although it aims to engage with them, not all people over the age of 50 will want to or be able to become involved in this process.  Co-production is a form of volunteering, and whilst people over 50 make up a significant proportion of the population, more women than men volunteer (WCVA 2014,12).  Even among trustees of formally constituted voluntary groups, men hold only a slight majority (n=56%, WCVA 2014, 13).  Finally, although the Strategy emphasises that older people are not just concerned with matters relating to health and social care, previous research has already indicated that policy makers and service providers in other areas may not appreciate this view or consider it a priority to mainstream older people's concerns into their area of work.

To address these dilemmas, sample groups were selected on purposive, prescribed criteria (Ritchie et al 2003, 78 & 82).  In order to identify suitable sample groups, I spent 2 days travelling around the area, spending time in community venues including cafes, pubs, a community centre, a sports centre, a café that was part of a Communities First project and a Christian bookshop with adjoining tea shop.  I covered a distance of approximately 60 miles by public transport.  In addition to this, I spent a day with a walking group.

My observation notes and my initial thoughts on potential sample groups were discussed with my Thesis Committee.  Although approval for observation had been given by the University Ethics Committee, there was further discussion on whether it was ethical to use observations, over-heard conversations or conversations with individuals without making them aware of my status and purpose.  There were discussions about the practicalities of collecting data based on observation in venues where people were unlikely to remain for long periods, and this led to my deciding that public transport and cafes would not provide sufficient opportunities to observe or engage with individuals for a sufficient length of time.  We also discussed the various options for collecting data during the course of another activity, such as "mobile methods".  I was aware from this preparatory field work, and from my pilot

work, that older men were under-represented in many activities.  Some activities where men were well-represented were not appropriate.  Sometimes this was because I could not do the activities myself, for example I do not play bowls and I know nothing about football and so I felt that I would always be distant from the group in such settings.  Sometimes this was because, although men may be well represented and I did feel able to participate, the activity is generally segregated.  For example even mixed choirs have men and women sitting separately and there is often little opportunity to mix outside of the rehearsal.  This wish to observe and engage with older men, partly through sharing an activity, led to my decision to collect data through joining a (different) walking group and spending time in two pubs.

In order to address all these consideration, I decided to collect data from four groups.  (Pen portraits of main respondents can be found in Appendix 4)

*Group 1:  Members of a volunteer-led walking group based in a semi-rural village*

The group was originally established as part of a (voluntary sector) Groundwork Trust, Health and Local Authority collaborative project to promote healthy living.  The group met during the week, and possibly as a consequence of this all the members were over the age of 50.  Walks took place fortnightly, and attendance ranged from 25 people to just 5.  This fluctuation was attributed to people being on holiday or other social engagements, caring responsibilities including being required to care for grandchildren during school holidays, ill health and bad weather conditions.  Most of the group lived within walking distance of the village centre, and had spent most of their lives in the village.  There were exceptions, including a woman who had moved into the area over 30 years earlier and maintained close contact with friends and relations in her home town in Lancashire, and 2 men who lived about 15 miles away, were English, and had no other links with the village.  Group conversations swapped between Welsh and English, often with one person speaking in Welsh and another replying in English.  A number of people stated that they did not speak Welsh, but were observed speaking in Welsh to other group members.  Some members spoke of past occupations, drove cars or spoke of holidays which suggested an affluent life style, but others described life-styles which were far less affluent.


*Group 2:  a group of retired men who met most mornings at a town centre pub.*

The pub was close to the bus station.  It was in a building that had originally been a furniture store, and was part of a national chain.   Both food and drink were low cost,

for example a breakfast was less than £4.00, but the furnishings and carpets were very clean and the room was well heated.  Staff were friendly, and customers appeared comfortable staying in the pub for long periods without buying more drinks.  None of this group lived in the town, but travelled between 6 and 25 miles to it each day.  Two spoke of then extending their journey to another town a further 6 miles away before returning home at the end of the day.  Two were farmers, and were teased by the other two men for being rich.  They appeared comfortable with this, and one showed a photograph of his farm house, which was very large and appeared in very good condition.  In contrast with this, one man who was a retired hospital porter appeared cautious before telling me that he lived in a Community First area.  The fourth man was a retired miner living in a Housing Association sheltered housing complex in a mining village.

*Group 3:  a mix of customers visiting a CAMRA pub in a rural location, but with good public transport links.*

The pub had been bought by new owners about 5 years previously, and had been completely refurbished.  It was now known for not having any televisions or background music, but for providing traditional pub board games and books.  It was a micro-brewery and had many CAMRA awards.  This pub also had an unrushed, friendly atmosphere, but the drinks were more expensive than those of the town centre pub.  This group included some individuals who lived within 10 miles of the pub, and a "rail rambler" group who had travelled from further afield.  People came from a mix of backgrounds, including retired professionals and sole trader craftsmen, such as plumbers and plasterers, who were continuing to work past retirement age.

*Group 4:  Lay people who are current or recent members of a 50+ forum.*

At the time that the research was carried out, the 50+ Forum Executive was entirely female.  Members came from town centre, rural and urban village areas across the local authority area.  The youngest member was in her late 50s, and the oldest was over 90.  Most were retired professionals, including someone who had been a senior manager in a multi-national company and another who had been head of a professional training school.

In order to establish the strategic context, interviews were also held with the current and original Welsh Government Ageing Strategy Managers.

*Method*

*Village Walking Group*

Data were collected from the village walking group through joining them on the fortnightly walks over a 6 month period between March and August 2012, chatting informally and observing.  Before joining the group, I spoke to the group leader and gave her information sheets and consent sheets.  The group leader took this information to the group and asked permission for me to join them.  They agreed, on condition that they were not named individually.  However no one signed a consent form, despite my asking on a number of occasions.  Throughout the period, individuals often asked me how my research was progressing and when it would be complete.  The group invited me to join them for their Christmas lunch, when I was again asked for a progress report.  Consequently I feel confident that they were happy for me to use the data I collected from them.

Accompanying the group over a period of months resulted in conversations starting and then being returned to later.  Walking also allowed people to enter and withdraw from conversations easily, sometimes only saying a few words and then returning to expand on a comment later in the walk.  Combined with observation, this allowed some data to be reviewed and interpretations being challenged or changed.  This included people saying they didn't speak Welsh, but then being observed speaking Welsh, and people saying that they were not involved in voluntary work, but later speaking about being active in many local organizations or "below the radar" voluntary activity.  Data were sometimes generated by people asking about my research, or my asking them direct questions linked to the subject areas in my proposed semi-structured interviews.  At other times data were collected as a result of people chatting about something which they probably would not have thought relevant to my research.  For example, a group of friends spoke of the plans they were making for a stall at a "family fun day" at a local park, although none of them had mentioned this when I initially asked if they were involved in voluntary activity.

Initially I had intended to carry a voice record for capturing data.  However the process of walking outdoors, often across rough terrain and in poor weather

conditions, resulted in very poor audio quality.  I therefore made detailed notes on my return from each walk.  I recorded direct quotations as faithfully as possible, including recording conversations between a number of group members.  In formal research circumstances, this gathering of data from a group of people who exchange views between themselves and a facilitator/researcher, might be termed a "focus group".  The members of the walking group would probably be highly amused to find their walks and chats described in this way, but I felt that it did not make the data collection method, or the data collected, of less value than data collected in more formal circumstances.

*Town Centre Pub*

Originally, I intended to collect data from the town centre pub purely through observation.  I went to the pub in the morning, as I knew that that was most popular with older customers.  However, even though I was accompanied by a woman of my age, we clearly appeared out-of-place as all the other customers appeared to be at least 10 years older than us and were either single men, groups of men or couples.  Possibly because of this, on the second morning we were approached by a man who asked why we were there.  After I had explained, he invited us to join his group.  I gave the group information sheets and consent sheets, which they took but showed no intention of reading.  However, they were very happy to discuss why they were in the pub, how they came to know each other, and their lives generally.  We spoke for over an hour, during which time I openly made notes.  Towards the end I explained again how I would like to use the comments and asked if they would sign consent sheets.  They were very firm that they would not sign any forms, but were also clear that they were very happy for me to use my notes as long as they could not be identified from them.

*CAMRA Pub*

The CAMRA pub was not as big an establishment as the town centre pub.  I introduced myself to the landlord, explained what I was doing and gave him copies of my information sheets and consent forms.  He immediately agreed to my speaking to his customers, commenting that people over the age of 50 were his main clientele and also speaking about a number who were active in the local U3A.  I visited the pub on 3 occasions in the late afternoon.  On each occasion, the landlord introduced me to a group and explained what I was doing.  I then sat with them for a period of up to an hour, effectively having a focus group.  As with the walking group and the town centre pub group, people took the information sheets but did not read them.  They also refused to complete consent forms, although they were all very happy to speak to me.

Initially I planned to collect data from a 50+ Forum.  I gained permission through writing to the Chair and then giving a presentation to the Forum Executive, providing copies of the Ethics Committee approved information sheet and consent sheets. The Executive agreed to my proposal, and I was invited to their next meeting.  I then asked for the consent sheets to be signed, but the Chair refused, saying that as the minutes of the previous meeting stated that the Executive had given permission, this was not necessary.  After further discussion, the Chair agreed to the consent sheets being circulated for individuals to sign, but expressed her displeasure that the University Ethics Committee should not be satisfied with the recorded minutes of a Forum Executive meeting.

After the second meeting, it was clear that the Forum had recently undergone a crisis which had led to the Executive Chair leaving and the current Chair taking up her role.  Much time was given to discussing the previous Chair and AWF, an organization I had not heard of previously.  There was also much discussion about the actions of the former Development Officer, whose post had ended about 3 months before my research started but who was now an ordinary member of the Forum.  Following discussions with my Thesis Committee, it was agreed that I should also interview the past Chairman and former Development Officer.

 Data were collected through reviewing documentation generated by the 50+ Forum and AWF, including past agenda, minutes, progress reports and constitutions.  All members were invited to participate in semi-structured interviews, and the majority agreed to this.  People were given a choice of where and when to be interviewed, and to be interviewed alone or with someone else.  Most interviews took place on a one-to-one basis though some chose to be interviewed in pairs.  Most interviews were held in people's homes, but some were held in coffee shops or the lounge of a large hotel which was part of an international chain and popular for informal business meetings.  Permission was given to record interviews, although there were occasions when people asked for the recording device to be turned off.  This was always accepted without question.  Permission was also given to observe and make notes of meeting proceedings and informal periods around them, such as during the

gathering period before the meetings started and during coffee breaks.  One person witheld premission to record Forum meetings and  and so I decided not to seek permission to record AWF meetings but to rely on note taking for both series of meetings.  The following events were observed:

*Fig 4:  Observed events*

| 50+ Forum Executive Meetings | March, April, May, June, July, August 2012 |
| --- | --- |
| 50+ Forum AGMs | Summer 2012, summer 2013 |
| AWF regional group meetings | December 2012, May 2013 |
| AWF Wales seminar (organised by Welsh Government with external consultant facilitator) | November 2012 |

## **Ethical considerations**

The proposed data collection method required ethical review by the University Ethics Committee for the following reasons:

- some parts may have been conducted without participants' full and informed consent at the time the study was carried out.

- some participants may be vulnerable, for example they may have a disability.

Consent forms and information sheets were produced.  Individuals involved in the 50+ forum and AWF signed individual consent forms agreeing to notes being taken and interviews being recorded.  Some people asked for the tape to be turned off during parts of interviews, although they continued to speak on the matters being discussed and agreed to my taking notes.  Their concern was that they should not be identified as individuals.  Collecting data from the other groups – the walking group and the two pubs – when individuals had refused to sign a consent sheet could raise ethical questions.  The only concern that was raised by individuals was that they should not be identified, and this has been respected.  A theme that was apparent in the data was that many older people wished to take responsibility and risks, and objected to or avoided having to fill in forms or follow organizations' rules.  Whilst

collecting data from individuals when they have not given written consent could be viewed as unethical, excluding individuals from participating in the research process because they do not wish to fill in forms could also be viewed as unethical.

Evidence of a Criminal Records Bureau check was provided. Hard copies of data were stored securely.  Related electronic data were password protected and stored on the Bangor University portal.   All data will be retained according to data protection requirements (in a safe place within the University until an agreed date after the PhD is awarded).

To ensure my personal safety when carrying out fieldwork, I ensured that a responsible person knew of my plans and would take suitable action should I fail to return home at the agreed time.

## Analysis

The amount of data collected was great; it was not uncommon for the transcription of a 30 minute interview to be more than 20 pages of text.  I decided to use NVivo software, following my positive experience of using it for the Flintshire project.  I considered, but decided against using grounded theory, as espoused by Glaser & Strauss (1967).  My decision to collect data from 4 different groups had practical implications:  for example the 50+ forums only met at pre-set times and the walking group did not meet in bad weather.  This meant that data would not be collected in any particular order, and there were likely to be periods when more data were collected from one group than from another.  Although I wished to analyse data whilst it was being collected, rather than separating my period of data collection from that of analysis, I also wanted to be able to return to data that had been collected and analysed, reviewing my initial analysis in light of newly collected data.  This led to my decision to use framework analysis to manage, interpret and analyse the data (Ritchie and Spencer, 1994), supported by NVivo software. Framework analysis is based on a five step process:

1. Familiarization: when the researcher "goes over" the data collected, such as by reading through notes or transcribing tapes, thereby gaining an overview.

Familiarization can take place throughout the data collection period, or at the end.

2. Identifying a thematic framework: this is drawn from the key issues, concepts and themes expressed by participants. However, decisions on themes are not finite, and the framework may change or be refined as the process continues.

3. Indexing: when portions or sections of data are indexed to correspond to a particular theme or themes.

4. Charting: when pieces of data are arranged in charts of the identified themes.

5. Mapping and interpretation: whereby, through analysis of the charts, the researcher is guided to interpret the data.

This approach assisted with the management of the data. However, it still required rigorous challenge, both by me and by supervisors, to ensure that the thematic framework identified was a reflection of the data and to ensure that the consequent indexing, charting, mapping and interpretation was carried out with sufficient attention to detail. As emphasised by Srivastava et al (2009, 76), this was necessary to ensure that the "strategy or recommendations made by the research echo the true attitudes, beliefs and values of the participants" rather than my own.

In order to consider the relationships between individuals and groups, use was also made of social network analysis software (Borgatti, Everett & Freeman, 2002). Representing the data collected for this study as a series of network maps has some benefits, but the maps need to be viewed with a degree of caution. Data concerning social networks were not collected through direct, quantitative surveys, but through noting references made during general conversations. Data were collected from AWF and 50+ Forum members through observation of meetings and through interviews. More data were collected from the 50+ Forum than AWF, and so the amount of information gathered about individual members is correspondingly greater. Data from the Village Walking Group, CAMRA Pub and Town Centre Pub have been collected from the groups as a whole, and so a relationship between one of these groups and an organisation or community of interest should not be

interpreted as meaning that all the group members have such a relationship.  Finally, the responses of two Forum members, Alice and Jennifer, are noted as a single response.  Alice and Jennifer met and became friends when they worked together in the Health Service in the 1970's.  Jennifer is blind, and no longer has a working guide dog because of her age.   Alice therefore acts as a support and guide for Jennifer and they share many interests, including their interest in voluntary work.  Alice and Jennifer do not agree with each other on everything.  However, they not only are involved with the same groups, they attend together.  Furthermore, their involvement in some groups spans decades. Consequently representing them as one response is not totally inaccurate.

## My place in the policy and research arena

My decision to undertake this research came after working in the voluntary and statutory sectors in Wales for over 25 years, usually in policy development roles and frequently in co-production or partnership settings.  When embarking on my PhD, I was also approaching my 50th birthday.  This made me conscious that the policy statements, strategic objectives and events organised to engage with and empower "older people" were being directed at me.  It introduced a very personal interest in the research area, and heightened my awareness of the fluidity of the term "older people".  As such, my chosen methodology was based on reflexivity principles, proposing that there is no "dominant epistemological position" or "unity of knowledge", but rather accepting my own position and developing theory from the reality in which I live (Anderson & Baym 2004,593).  It embraced aspects of standpoint theory as described by Hartsock (1987, 159), accepting that my standpoint is "not simply an interested position (interpreted as bias) but is interested in the sense of being engaged", but also that "however well-intentioned one may be, the real relations of humans with each other and with the natural world are not visible".  Whilst I accepted that my personal circumstances meant that I could not claim to be totally objective and that any attempt to conceal my personal relationship with the research subject would be a deception, this did not undermine the value of my research.  Others who may claim independence may also have material interests

in deception (such as a wish to maintain their own authority over the policy development process).

At the start of my research, I only had experience of working with one person involved with my data collection groups, the current Chair of the 50+ Forum, Hillary. As will be described later, Hillary has been active in the statutory and voluntary sectors, both locally and nationally, for over 50 years. Consequently most people working in these areas are likely to have heard of her, even if they have not worked with her directly. However, my experience and networks provided benefits when planning my data collection. Experience gave me an understanding of organization structures and protocols for approaching individuals and groups. This undoubtedly helped in the processes of establishing contact and securing agreement from participants. Also, although I did not know people directly, I had established networks and used these. Later chapters discuss the influence of networks, and refer to people "meeting up for coffee". I "met up for coffee" with many people in both the statutory and voluntary sectors across Wales. These discussions were used to build my understanding of the position of the Strategy for Older People within the overall Welsh Government policy context. They helped to identify a suitable geographical area for my data collection. I believe that using these networks also added to the trust that was established between myself and people interviewed or observed, leading to people being willing to give time to meet with me as much because we shared a mutual acquaintance as because they were interested in my research. This resulted in my being allowed to attend some Welsh Government hosted events that students may not automatically be invited to, securing interviews with people with relative ease and some people being extremely candid during interviews.

# Chapter 4 - What do we mean by "A Strategy for Older People"?

## Policy area

These research questions are being considered within the context of the Welsh Government Strategy for Older People in Wales (Phase 1 2003-2008, Phase 2 2008-2013, Phase 3 2013-2023)

The Strategy for Older People in now in its third phase. When it was first launched in 2003, it included a key aim to tackle discrimination against older people and to give older people a stronger voice in society (Welsh Assembly Government 2003, 9). The second phase, launched in 2008, contained the same commitment to collaborative working and involving citizens in service design and delivery. All four themes of the Strategy; "Valuing older people", "Changing society", "Well being and independence" and "Making it happen" made direct reference to the need for a collaborative approach. In order to achieve the required objectives, this phase of the Strategy stated that it is necessary to involve a full range of statutory and voluntary organizations as well as older people themselves. It went on to state that this collaboration is required across all sectors, not just services within Health and Social Care, which possibly arises from the Strategy proposing that the term "older people" covers everyone over the age of 50. The group "older people" was defined by chronological age, not health, economic activity or any other characteristics. As well as being promoted as beneficial for policy makers and service planners, this collaborative approach is also promoted as being beneficial for older people themselves. It is presented as a means of achieving social inclusion, which itself is presented as "a key element in the quality of life, health and well being of older people" (Welsh Assembly Government 2008, 17).

Whilst the Strategy recognises that "older people are not a homogeneous group" (p7), setting 50 as the lower age limit for identifying the people it aims to cover is problematic as there is no agreed definition of what constitutes "old" or "older". Anyone of 50 is indeed older than someone aged between 0 and 49, but anyone of 51 is similarly older than someone of 50 and this chronological age difference does not mean that their mental or physical health is better, or their life expectancy greater

(Laslett 1996, 50).  Currently it is estimated that over 37% of the population in Wales is over the age of 50, and so covered by the Strategy for Older People (Age Concern Cymru 2009, 7).  Given the rate at which the proportion of the population over 50 is increasing, it is possible that the Strategy will cover the majority of the population of Wales in a relatively short period of time. This raises questions both of how to achieve certain strategic objectives, and how to evaluate the achievement made.  An example of this is the strategic objective to "enhance the participation of older people in society and at all levels of government, particularly in the planning and development of local services".  A very brief survey of the age profile of Elected Members of local authority and community councils in Wales and of holders of senior management positions within the public sector generally would show that the majority of places are already held by people over the age of 50.  Consequently it could be concluded that this strategic objective has already been achieved, possibly to the detriment of people under the age of 50.

This commitment to collaboration and co-production in the implementation of the Strategy has been successful to a certain extent, with most local authority areas establishing some type of "50+ forum".  A collection of examples of good practice published by the WLGA in 2009 gave examples of the establishment of a panel of older people willing to take part in postal/on-line surveys and consultations, the appointment of a project worker to work with individuals and groups from minority ethnic groups, and a variety of events and conferences to consider specific policies or services (2009, 5-6).  However, it was accepted that barriers still exist.  The evaluation report produced at the end of the first phase of the Strategy concluded:

> "The Consultation clearly shows that the Assembly, Local Authorities and other statutory bodies should consider alternative ways of consulting and engaging with older people along with alternative venues. There is a need to ensure 50+ forums are utilised to their full potential, and not just drawn upon to consult on specific topics. They need to be able to develop their own agendas, and know that consultation is a two way process. In line with this, older people's groups require feedback and confirmation that they are being heard and their views appropriately acted upon.

There are also some training issues. For many people who have not previously had dealings with the public sector, attending council meetings may appear intimidating. In line with that older people may need to develop skills to assist in their participation in service planning and delivery. "

(Advisory Group on the Strategy for Older People 2007, 15)

Similarly the Interim Review (Porter et al 2007, iii), found that whilst there was shared ownership of the Strategy, it was particular individuals who actually made things happen.  Concern was also expressed about how representative 50+ Forum members were of the general population.   This Review concluded  that of the forums of people over 50 which had been set up across Wales to provide a collective "voice" for older people in the planning process, membership was typically of highly motivated individuals who were already active in their local communities.  The Review also found that whilst most forums had adopted traditional committee structures, there was not necessarily training for members to enable people without the relevant skills or experience to participate fully in such structures.  Finally, the Review found that representation from people between the ages of 50-65 was low and that even among people over 65, very few identified themselves as "older people". Therefore, although some older people were participating in the planning and development of local services through the mechanisms afforded by the Strategy for Older People, these individuals could not be said to represent such a diverse community as "people over the age of 50". They were people who already had the skills needed to co-produce effectively within the forum structures which had been established; they were sufficiently confident and sufficiently motivated to become active in their community and they had the resources to participate (including the time to attend meetings during the working day). Added to this, the Review found that members of 50+ Forums were experiencing frustration because the mechanisms for them to have an influence were not clear enough, and also because many of the issues which concerned them could not be addressed at a local level.  (Porter et al, 2007, v).

The Report which followed the Review ("Living Longer Living Better" 2008, 17) included the following recommendations for action:

- Tackling barriers to effective involvement

- Widening involvement and increasing engagement

- *(Developing)* approaches to engage groups that services find hard to reach

- Capacity building for older people

- Facilitating a review of the training needs of older people to ensure fuller engagement and participation

The third phase of the Strategy was launched in June 2013 after a further period of consultation with older people and other stakeholders.   The whole document is structured in a way that draws attention to the importance that has been placed on these consultations; for example chapters open with a text box headed "Older people told us that", followed by a series of simple sentences such as "feeling like they belong is important" (Welsh Government 2013, 6).  The document also states that one of the main successes of the Strategy to date has been

> "the mechanisms and structures that have been established at a local and national level that allow public services to find and hear the voice of older people and allow older people to be involved in the decisions that affect their daily lives"

<p align="right">(Welsh Government 2013, 21)</p>

**<u>Structures for co-production and engagement</u>**

These "mechanisms and structures"  could be viewed as a simple hierarchy of transactions between organizations, with older people occupying a very lowly position (fig 5)

*Fig 5:  structures of co-production*
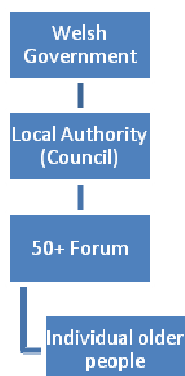


In the area where data were collected for this study, this hierarchy had an additional link in the form of the Council for Voluntary Services (CVSC).  Until approximately 6 months before the period when data were collected, the CVSC had been contracted by the Council, through a service level agreement, to provide a Development Officer for the 50+ forum along with office space.   The 50+ forum, although not eligible for charitable status, was a constituted voluntary organisation and a member of the CVSC.  Part of the CVSC's mission was to "represent and champion the voluntary and community sectors locally and nationally"(website, 2012), and so part of its role was to represent and champion the 50+ forum to the local authority and other statutory bodies

Therefore, a further level could be added to the hierarchy chain (fig 6)

*Fig 6:  Structures of co-production*
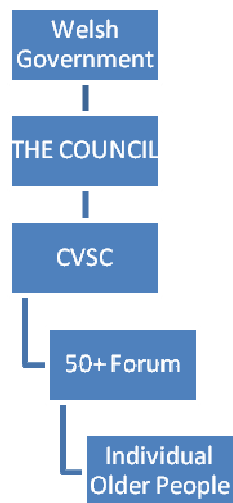


AWF also distorts the pure hierarchy of transactions between individual older people, the 50+ forum and other bodies.  AWF was

> "set up in late 2010 to become the vehicle for the considered viewpoint of older people in Wales to be put directly to the Welsh Government"

> "

AWF receives administrative support from the Welsh Government, and its membership comprises representatives from older people's forums from across Wales.  As such it could be viewed as an alternative hierarchy to that which links the 50+ forum to the Welsh Government via the CVSC and the Council (fig 7).

*Fig 7: structures of co-production*
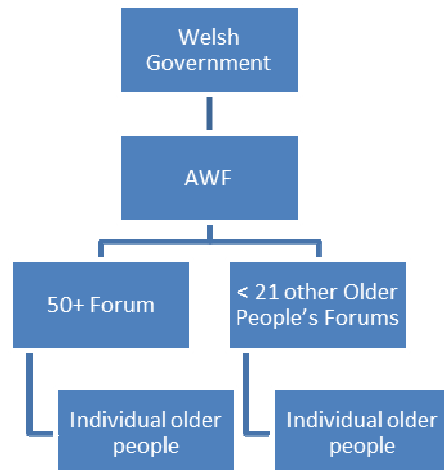


However, AWF's membership is not made up solely of people who are representing forums of older people. Its constitution also allows founder members of AWF to continue to be members, even if they are not representing a forum. (fig 8)

*Fig 8: Structures of co-production*
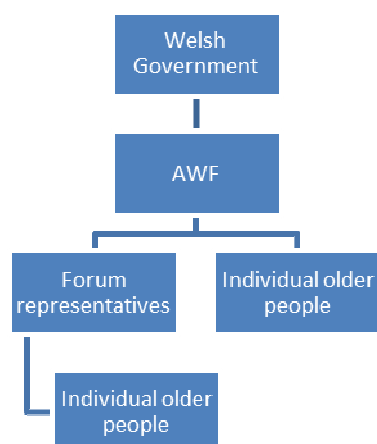


Since its establishment, AWF has met in Cardiff. In order to encourage participation from across Wales, in the past 12 months four regional groups have been established, which report to the main group. The four regional chairs are the 4 AWF members who are also members of the National Partnership Forum for Older People (NPF), the Ministerial Advisory Group on Ageing in Wales. (Appendix 5, NPF Terms of Reference and list of current forum members)

The NPF is a public body, and appointments to it are made following the procedures established for making all public appointments. Consequently, the AWF members of the NPF have not been chosen by their AWF peers, they have been chosen by a Public Appointments committee. The NPF member who has gone on to become Chair of the Regional AWF group in the area where this study was carried out, is an individual founder member, not a representative of a forum. Although the Regional AWF group includes a representative of the 50+ forum, it also includes members who are individual older people. Some of these used to be members of the 50+ Forum, but have chosen to end their membership. (fig 9)

*Fig 9:  Structures of co-production*
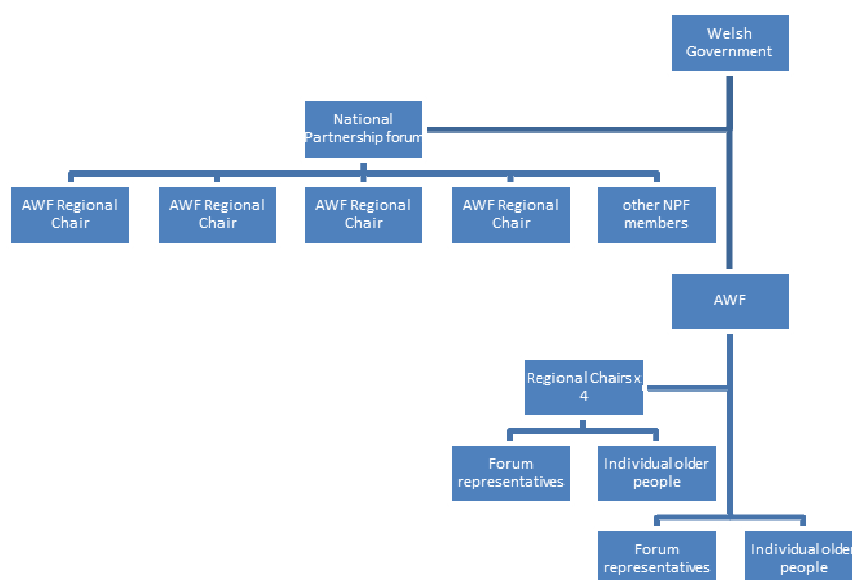


Consequently, older people's contribution is made up of representations from people who represent a group of other older people, and representations from people who have not been nominated to contribute by other older people.

Furthermore, even within the simplistic hierarchy of transactions, the differences between individual and group transactions become blurred.  Whilst the 50+ forum may have a relationship with the CVSC , the Council or AWF at an organisational level, individual members of the forum may also have relationships with individual members of the CVSC, the Council or AWF, as well as with the Welsh Government and other organizations that contribute to the planning and implementation of the Strategy for Older People.  Additionally, some members of the 50+ forum were also members of the CVSC and the Council, and some had previously operated within or been employed by the CVSC, the Council or the Welsh Government.  The "mechanisms and structures" become increasingly complex and confused.

<u>How Welsh Government Officials translate this into words</u>

Interviews with the original and current Welsh Government Ageing Strategy Managers indicated that the Welsh Government was aware of the existing complexity and confusion.  The current Manager described her experience when taking up her new position:

> *When I started I couldn't get a picture of all the different groups, and then I sat my line manager down and I said "who are all these groups?".  And every group wants to get the ear of the Minister.  That's the top of their sort of list of priorities, "How do I influence the Minister".  So I've got this piece of card like this, its got the Minister at the top and all these groups underneath (fig 10).  And all these groups, they all have mechanisms for reaching the Minister.  Some of them have direct mechanisms, and some of them have to go through other groups.  And this kind of thing, that looks a bit like a half circle with all the arrows on it; you might find quite useful…*

*Fig 10: Structures of co-production*
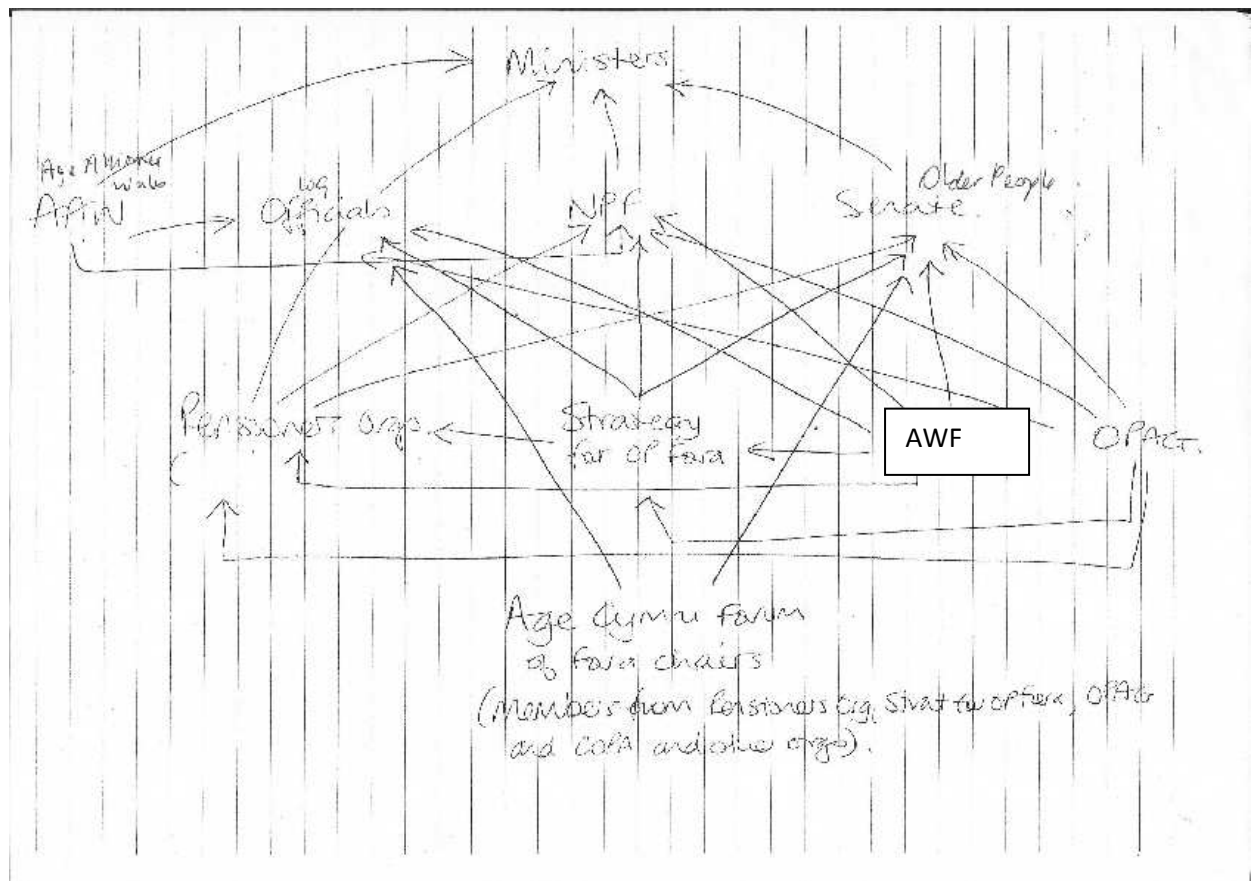


She went on to explain that her confusion was not simply because she was a new member of staff:

> *And it is just hand written, but I know that some of my colleagues have photocopied it and stuck it on their things, because , just to kind of, get a visual of who everybody is. Because it, there seem to be so many different groups, all with similar aims, all operating out there, and all feeding different groups, sideways and up and down.*

This handwritten diagram, produced on a sheet of A4 note paper and then copied by colleagues, is reproduced in Appendix 6 to assist the reader. The Welsh Government did not have a similar version, only the original handwritten version. The Welsh Government is a large, reasonably resourced organisation. The absence of a professionally produced version of the diagram poses a number of questions. It may reflect a lack of concern for the mechanisms and structures which have developed to give a voice to older people and allow them to be involved in decision-making, as in reality these mechanisms do not play any part in the decision-making process and so do not need to be documented and understood. Alternatively, it may reflect a wish not to prescribe structures or methods for engaging with older people; acknowledging that "putting it down in black and white" may lead to organizations concluding that "this is the way it must be done".

The previous Ageing Strategy Manager, who had held the post from the launch of Phase 1 of the Strategy, pointed out that:

> There wasn't some sort of diktat down from the Welsh Government to tell
> local authorities how to spend their money for the Strategy for Older People.

Whilst the Welsh Government has been supportive of having a range of methods for engaging older people, they also recognise that many organizations and individuals rely on or are drawn to traditional structures and ways of working which can alienate and limit diversity of membership. This was mentioned in interviews with both the current and original Ageing Strategy Managers, and was noted in evaluations and reviews commissioned by the Welsh Government. The original Ageing Strategy Manager pointed out that this tendency to rely on traditional structures and ways of working was not limited to local authorities' attempts to engage with older people. He described his experience of attending a 50+ forum which had been asked to participate in a consultation carried out by a national public body:

> Some of the forums were getting this, almost on a daily basis, someone
> coming along with an enormous consultation document. And I had one of
> those moments, where I was sitting in a forum meeting …. And we started
> going through the document, and the questions were **completely**
> inaccessible. They were asking forums, you know, kind of, ideas on

*development plans and that kind of thing. And it was in a language that **I** didn't understand, and people were looking at me to, kind of, translate what some of these things meant, and I couldn't do that, and that was quite a key moment for me.*

He went on to speak of the Welsh Government's wish to move away from such traditional methods:

*So I think we were looking to supporting forums in terms of coming together, but also recognising that there needs to be a lot more, and being able to take people out of that comfort zone of saying "I've consulted, I've engaged with older people", simply by turning up to a forum …… that was a concern for us.*

*So we were kind of  trying to encourage more innovative engagement mechanisms, and I guess,  we  always spoke of it in terms of "going to where people are".*

The current Ageing Strategy Manager confirmed that this approach was continuing as the Strategy entered its third phase:

*I think they (Welsh Government) are very supportive of any that's able, that's able to put useful information forward.  And I think … I don't get the impression they think there's one way that's the right way.  That there needs to be a variety .  Because not everybody will join a 50+, and maybe it's about …. Maybe there's an expectation that groups will find a way that suits them. But they're quite, they're very supportive.*

Therefore, in terms of the strategic context for this study, it is important to remember that the Welsh Government had not prescribed how older people are to be engaged. The structures and methods adopted reflect the choices of the lay and professional people within each local authority area.  However, the apparent need for the new Ageing Strategy Manager to produce her "piece of card" diagram in order to "get a picture of all the different groups", and the action of colleagues who had "photocopied it and stuck it on their things" indicates that even civil servants within the Welsh Government found working within an inherently loose structure to be a

difficult experience.  If the civil servants who were leading the process found such a lack of structure unnerving, it is understandable that others also found it challenging and confusing.

## How this has been acted out in one area

The level of funding provided by the Welsh Government to local authorities to support engagement has gradually reduced.  Although this reduction was planned from the outset, the timing of the reduction has coincided with other cuts to public funding.

Of all the current and past members of the 50+ Forum interviewed, only 2 people indicated they had a clear understanding of how Strategy funding had been used in the area where the research was carried out; the past chair John and the former Development Officer, Mark, who had gone on to become a member of the 50+ Forum.  Others spoke of being aware of cuts in government spending generally, and sometimes of being aware of cuts in Strategy funding.  Some showed an awareness that 50+ forums in other areas had more funding than them, and felt this unfair. However, most did not seem greatly concerned or interested in the matter, accepting cuts in funding as unavoidable.

Interviews and observations at 50+ Forum meetings indicated funding was initially used by the Council to employ a Coordinator.  The Council also established a service level agreement with its CVSC to develop a 50+ forum and funding was sufficient for office premises, the employment of a Development Officer and operating costs.  Approximately 6 months before the data were collected, the reduction in funding had led to the termination of the service level agreement between the Council and the CVSC.  The Council had not employed a dedicated Coordinator for some years, and the role had become part of the Council's Health, Social Care and Wellbeing senior manager role. It was not possible to obtain documentation on this from the 50+ Forum, as their records were incomplete and in need of attention.  When the Development Officer post had ended, all records had

been placed for storage in the CVSC building and were not in order. It was reported at a 50+ Forum meeting that some may have been destroyed by accident.

Since its foundation, the 50+ Forum had had a number of chairs, including Deborah (existing member) and John (ex member). The current chair, Hillary, had joined the 50+ Forum around the time of the AGM immediately prior to the data collection period. Hillary had no previous involvement with the 50+ Forum, although she was a founder member and Trustee of the CVSC. The previous chair, John, had taken up this position during a period when the development officer Mark was seconded to another role. During interviews, Mark was open about his not agreeing with John's informal approach, and John was open about his not agreeing with the way that the Council and CVSC established a service level agreement. Other members of the Forum reported that the relationship between the CVSC and John deteriorated to the extent that John was not allowed into the CVSC building. It was also reported that at the 50+ Forum AGM, CVSC Officers attended and insisted that there should be a secret ballot for election of officers. The Development Officer, who was employed by the CVSC, did not attend the AGM and although this was commented on by some Forum members, the reason for his non-attendance was not known. Interviews and observed comments during 50+ Forum meetings indicate that these elections were confused, with some describing them as "a shambles". John was elected, but stepped down as chair shortly afterwards and it is not clear how Hillary then became chair. One person reported that it occurred through Hillary volunteering to take on the role as no one else wished to do it, and another said that Hillary had been "put there" by the CVSC. Others simply appeared grateful and to an extent, relieved, that Hillary had taken on a role which they would not chose for themselves. The possible causes for the breakdown in relationship between John and the CVSC, reasons for the CVSC intervening in the Forum AGM and Hillary's adoption as chair will be considered in later chapters.

During the period that this research was carried out, John made the decision to leave the 50+ Forum entirely, but continued his membership of AWF. Observed 50+ Forum meetings included many heated discussions about John's attendance at AWF meetings, reports of a meeting between John and Forum representatives to discuss this, and discussions about making approaches to the Welsh Government to address

the matter.  It was also discussed in interviews with John and with some 50+ Forum members, although others explicitly or implicitly refused to make any comment.  As well as anger or concern at John's attendance at AWF meetings, observed discussions at forum meetings highlighted the level of ignorance of what AWF was or what it did.  Although John had attended meetings for some time, existing forum members claimed that they had not received reports back from meetings and that they had no documentation about AWF.  Further investigation found that there is no information easily available to the public regarding AWF, only occasional reference to its existence on related web sites such as AGE Cymru.  During our interview, John provided documents relating to AWF, including a leaflet headed "What is AWF" and the (undated) Welsh Government Induction Pack for the National Partnership Forum. The most recent documentation relating to the Ministerial Advisory Group on the Welsh Government website is dated November 2011, and the most recent minutes on the NPF's own website are for March 2011.

## **Mechanisms and Structures – concluding points**

The initial and changing  circumstances which took place throughout the data collection period confirm that there were mechanisms and structures in place for giving older people a voice, as advocated by the Welsh Government.   However the variety of mechanisms and structures, along with their changing nature, brought confusion and a lack of understanding for some older people.  The research seeks to address the extent to which these affected the balance of power, the approaches to collaboration adopted and whether the result was to allow or deter older people from being involved in the decisions that affect their daily lives.

# Chapter 5 – Motivation

## Introduction

This chapter considers what motivates older people to become involved in voluntary activity, drawing on theories of motivation and of generativity. Different forms of voluntary activity are considered: activity directed and supported by organizations which are regulated by the Charity Commission and activity by groups which are unregulated and which would fall under what are sometimes referred to as Below the Radar or BTR groups (McCabe et al 2010). Differentiation is also made between voluntary activity which requires direct action, and voluntary activity which involves committee-based activities. The chapter concurs with earlier research concerning people's motivation to engage in voluntary action because of a wish to contribute to their community, both now and in the future, and for personal satisfaction and gain. It also finds reasons which are specific to and grow from people becoming older. These include people who have no previous experience of voluntary activity being motivated by a wish to challenge age discrimination. An increase in confidence and a willingness to take risks, which many felt was a benefit of growing older, was found to both initiate involvement in some voluntary activities, and deter involvement with others. Rather than being deterred by anything associated with "being old", many valued the benefits, with free bus passes motivating people to become involved in organised and below the radar voluntary activities. A wish to maintain professional identity was a powerful motivation for many older people's actions. At times, this was so extreme that achieving it deterred other older people from becoming engaged in a given activity. Whilst this chapter identifies this as a source of motivation for this behaviour, and identifies its consequences, questions of why and how people achieved their goal remain unresolved.

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## Why motivation to volunteer is of relevance to this research

### *Is refusing to volunteer anti-social?*

Engagement with a 50+ forum or any organization or event associated with the Strategy for Older People is a voluntary activity.  Although the Strategy aims to engage all people over the age of 50, some will chose to do so whilst others will not.  But before considering whether or why an older person may be motivated to volunteer to become involved with a 50+ forum or any other form of voluntary activity, it is useful to consider why the Welsh Government suggests that an older person should be motivated.

The first Strategy for Older People (2003) was based on the findings and recommendations of an Advisory Group, published in the report "When I'm 64 … and more" (2002).  This Advisory Group was chaired by Deputy Minister for Health and Social Services, comprised representatives from a rage of statutory, voluntary and private sector services and received support from the Centre for Social Policy Research and Development, Institute of Medical and Social Care Research, University of Wales Bangor.  The methodology for producing the report included literature reviews and meetings with professional groups, but it also included a programme of 27 focus groups with older people from across Wales.  One of the key conclusions of this Advisory Group was:

> "To strengthen and promote participation in community activities and volunteering by and for older people"

> Welsh Assembly Government 2002, 11

Consequently, one of the strategic objectives of this first phase of the Strategy was:

> "To increase the level and impact of older people's involvement in their communities through volunteering and incentives to participate actively in the planning and development of local services and infrastructure"

> Welsh Assembly Government 2003, 14, my underlining

The Strategy specifies how such involvement in the community is beneficial:

> "Not least it improves quality of life, helps to tackle exclusion, isolation and loneliness and ensures older people can influence the development of the villages and towns in which they live"

<div align="right">Welsh Assembly Government 2003, 16</div>

It then goes on to describe how local government and the voluntary sector will encourage and build on current practice to develop volunteering activities. There is a strong suggestion that the act of volunteering is not just beneficial for the communities that gain from voluntary acts; volunteering is also beneficial for the volunteer.

This suggestion that the act of volunteering is beneficial for older people, and should therefore be encouraged, continues in Phase 2 of the Strategy. One of the themes of the Strategy, "Changing Society", includes a strategic objective to:

> "Encourage volunteering programmes involving the over 50s in order to extend the active contribution of older people in society."

<div align="right">Welsh Assembly Government 2008, 26</div>

The Welsh Government is not unusual in suggesting that older people may benefit personally from the act of volunteering. For example, in response to the UK Government's BIG Society proposals, the national voluntary organisation Age UK reported that older people who took part in volunteering benefitted from "improved mental and physical health prospects, improved life satisfaction, a feeling of usefulness and of having a role to play in society, (and) opportunities for social interaction" (Age UK 2009, 2).

Also, it must be acknowledge that all three phases of the Strategy are at pains to emphasise the voluntary, and consequently unpaid, contribution that older

people are already making to society. The Phase 2 document estimates older people contribute abut 25% of the national output and that in Wales, the value of child care provided by grandparents is estimated at £259 million and the value of volunteering at £460 million a year (WAG 2008, 25). The Phase 3 document emphasises how:

> "Older people play a crucial role in their communities – they engage in paid or volunteering work, transmit experience and knowledge, or carry out caring responsibilities within their families."

> Welsh Government 2013, 12

However, given that the Welsh Government recognises that older people are making such a significant contribution, it is reasonable to question why it wishes to encourage older people to contribute even more. Would a refusal to contribute more, through not engaging in co-production or other forms of voluntary activity, be viewed as anti-social? A conscious decision not to improve one's quality of life, not to help tackle exclusion, isolation and loneliness and not to contribute to the development of one's town or village?

### *Why should older people need help to volunteer?*

Older people make up a disproportionately large group within the overall cohort of volunteers: the average age of trustees in Wales and England is 57 (Charity Commission 2012), and the average age of volunteers in Wales is higher than the general population (WCVA 2014, 12). These data suggest that older people are very capable of taking part in voluntary activity, both as providers of services and in committee based roles and so the question is asked: why does the Welsh Government feel it is necessary to help them further? The Strategy for Older People aims to address the barriers faced by older people in Wales (Welsh Government 2013, 2), but what barriers to volunteering does being over 50, or even over 70,

present?  Does an assumption that older people face barriers and so need help reinforce anti-social views of older people as incapable and in need of assistance?

***And finally …. Why are you doing it that way and not my way?***

As discussed earlier, voluntary action can involve informal, "below the radar" activity as well as action through organised groups.  It can involve direct service provision as well as committee based activity.  Much of this is far removed from the co-production structures described in Chapter 4.  Considering motivation helps to answer questions of why some people become involved in the established co-production approaches whilst others do not; to consider whether approaches to co-production are excluding people simply because they are not motivated to engage with the structure being offered.  Considering motivation also allows questions to be asked of the impact of older people not sharing motivational factors; to ask whether a lack of motivation to participate in co-production approaches which motivate other players (notably statutory and established voluntary sector players) is viewed as anti-social by these other players.

## Theories of Motivation

Functionalist theory was adopted  in the 1990's to consider the motivations for such participation, for example Clary et al's development of a Volunteer Function Index (VFI, fig 1) in order to address their proposition that:

> "actions of volunteerism that appear to be quite similar on the surface may reflect markedly different underlying motivational processes and that the functions serviced by volunteerism manifest themselves in the unfolding dynamics of this form of helpfulness, influencing critical events associated with the initiation and maintenance of voluntary helping behaviour"

> (Clary et al 1998, 1517)

*Fig 11, based on Clary et al 1998, 1517ff*

| FUNCTION | INDIVIDUAL  NEEDS FULFILLED |
|---|---|
| Values | Opportunities that volunteerism provides for individual to express values related to altruistic and humanitarian concerns for others |
| Understanding | Opportunities for new learning experiences and the chance to exercise knowledge, skills and abilities that might otherwise go unpracticed. |
| Social | Opportunities to be with friends or to engage in activity viewed favourably by others |
| Career | Career-related benefits obtained from participation in volunteer work |
| Protective | Protection of the ego – for example reduction of feelings of guilt associated with being more fortunate than others |
| Enhancement | Processes associated with the enhancement of the ego |

The theory has been developed and refined, but the theoretical structure has remained reasonably recognisable:  many people will become involved in voluntary activity in order to fulfil one or more of the needs which the Volunteer Function Index encompasses.   The approach has been used to consider the involvement of older people in voluntary activity, for example Greenslade & White tested the theory as a predictor of above-average participation in volunteerism among older Australian adults (Greenslade & White 2005).  Their conclusion was that the theoretical framework had some use, but that in order to gain greater understanding of the

processes underlying older people's decisions to engage in volunteerism, researchers should "encompass a broad range of behavioural decision-making determinants" (168) .

Starting from such a very broad base, whilst it could be assumed that many older people will become involved in voluntary activity in order to fulfil one or more of the needs which the VFI encompasses, it clearly cannot be assumed that all older people will become involved, or that they will become involved in order to fulfill the same group of needs.

As this study concerns older people, reference is also made to theories of generativity. This was developed by Erikson (1963) and defined by McAdams and Logan as:

> "working for the well being of future generations through various kinds of activities and enterprises in churches, schools, neighborhoods, communities, organizations, and society writ large"

> (McAdams & Logan2004, 16)


Data for this study were collected in an area of Wales where Welsh was not the first language of the majority of the population, although over 10% of the population were reported to be able to speak Welsh (Statistics for Wales, 2011), and a number of those interviewed or observed spoke Welsh.   To consider whether language has any influence on motivation to volunteer, reference is made to Prys's work on the use of Welsh in the third sector in Wales (2010).  Unlike this research, Prys collected data from areas with the highest percentage of Welsh speakers and the highest number of Welsh speakers.  Of relevance to this research, it found that

> "Welsh speakers tended to belong to clubs and societies where Welsh was used either informally or as the main language of communication, implying that Welsh speakers tend to choose organisations that accommodate their language needs and preferences. ….. There was some evidence that the prevalence of Welsh speakers in some organisations is a reflection of the service users' Welsh-language social networks."

> (191)

However, Prys concludes that, even in areas with such a high percentage of Welsh speakers "Welsh-speaking third sector service users were not willing to ask for, or demand, services in their first language" (2010, 197).  All phases of the Strategy for Older people have made reference to the importance of recognising and supporting language needs, and so it is relevant to consider the influence that language has on volunteering opportunities associated with it.

## Findings

### *Generativity – a wish to give something back, to benefit others*

There were contrasting views within the group, with some people feeling that they had contributed sufficiently to society and felt no strong desire to continue doing so. This was summed up by a woman at the CAMRA Pub who had worked as a nurse in the NHS from the age of 17:

> *I've done my bit, I've worked.  But I'm retired now so I just have my pension, my superannuation.*

However, many other people expressed a wish to do something which would benefit others, or a wish to give something back to society.  For example, members of the Village Walking Group spoke of being involved with the local park community group, helping at the local hospice or hospital canteen.  Similarly the former 50+ Forum development officer, Mark, spoke about wanting to use the skills he had developed during his career for the benefit of others, though not necessarily in a voluntary capacity:

> *I just wanted to do something with …. Some of the skills I'd got working the time I did, I wanted to pass on, and use still.*

All of the 50+ Forum representatives spoke of being involved in the Forum, and often other organizations, because they wished to help other people and because they

believed that such activity could lead to change. For example, Liz described herself:

*I like helping people, and I like standing up for the underdog, because I think*
*…. Bureaucracy can go a bit bananas can't it?*

Bronwen expressed similar feelings, and was motivated to join the Forum because she felt it would provide a means for her to represent and campaign for older people:

*I belong to quite a few groups, and church and things, and people get*
*together and they moan and they complain, but they "oh, but I don't know*
*where to go and to speak to".  So I thought, you know, this would, this forum*
*would probably provide the way in.  Or at least be able to point them in the*
*right direction to get some help. You know.  And that's what we've done, you*
*know.  We've had some very good campaigns, over the years*

When discussing the purpose of the 50+ Forum, Hillary started by speaking of the Forum as a place where people with professional experience could use that experience to direct social policy:

*Hillary:  how do you define ordinary people?  ….. Volunteers?  That's better.  I*
*mean I'm a volunteer but I have lots of professional experience as well …*

*Llinos: why do people become involved in the forum?*

*Hillary:  Well, I think that those who become involved have seen the value and*
*have had the enjoyment of being involved in a thing like this.  I mean, if you*
*look at the executive, most of them have been involved in other vol orgs and*
*there are not many areas of policy in which the consumer can be directly*
*affecting the policy, and I think this is one of the aims, because there has*
*been a great deal of discussion at the executive.*

John's first voluntary activity when he left paid employment was action based, as a volunteer at his local hospital.  This ended after John witnessed an older lady being treated disrespectfully by other patients and by a nurse:

*I saw this nurse and I said "Oh, excuse me,  the lady on the end ward is*
*getting a little distressed".  And she turned to me and she said "what do you*
*mean", she said "bloody nuisance that woman", she said, "I'm bloody busy*

*doing this". "Don't you think the patient's more important than your bloody*
*computer", I said "You people make me sick". And I gave her one of these*
*cards (laugh). Then that was me finished. I couldn't, I couldn't go round*
*again after that.*

John became involved in the 50+ Forum at around the same time. He was attracted
to the Forum because he believed it would be a social group, but was willing to
continue being involved when he discovered it was not, and quickly became Chair.
During our interview, and during observed AWF events, John made strong
statements about his concerns about elder abuse, making references to his
experience as a hospital volunteer and reports he had heard from older people he
knew through his involvement with lunch clubs. Bringing these reports to the
attention of people in positions of authority, including senior politicians and civil
servants, appeared to be a strong motivation factor for him.

### *Volunteering to maintain health and wellbeing*

Although some people interviewed expressed a wish to be less active or have less
responsibility, and some reflected that death would come eventually, no one
expressed a wish to become inactive or to stop living and many expressed a wish to
practice and build on their skills and experience. This was often associated with a
view that opportunities to learn new experiences or practice skills or abilities already
gained, was beneficial for a healthy older age. Mark reflected on how his life had
developed since taking retirement from the Police at the age of 50:

> *You know you've got people who've got it marked on their calendar for 5*
> *years …. "that's the day I'm going to go". But when you do actually retire,*
> *after a while when you've tidied up the garage and all the rest of it. I think, the*
> *only people I know, they want to do something, they're not ready to die.*

Alice, who had been retired for over 20 years and had been involved with many
voluntary organizations since retirement, was also motivated because of her
perceived link between activity and wellbeing:

*Well it gives you something to get up in the morning quite honestly*

Alice then went on to speak of an ex-colleague who had not been active following retirement and now lived in a nursing home.  She compared this with the position of her friend Jennifer, who remained active at the age of 94, saying of her:

*You don't walk so well these days, but mentally you're still very agile*

Some spoke of volunteering providing a welcomed opportunity to learn new skills, for example Sharon and Deborah who both had no experience of committee work, but took on roles and thoroughly enjoyed the experience:

*Deborah:  And it's having the ability to take on some of these roles.  Like I said before, you were the treasurer, I was minute secretary and as I say, I hate paperwork, but I took it on and eventually became secretary*

*Sharon:  It was a case of you had to, wasn't it.  There was no one else to do it.*

*Deborah:  And as I say, you went out of the room, and came back as treasurer*

*Sharon:  Oh yeah, great*

*Deborah:  So she came back as treasurer ….. so she won't go out of the room any more in case she comes back as something else. (laughs)*

***Opportunities to be with friends***

Many of the people involved in this study shared friendship networks with people who were also members of their goal focused networks[5]. Some of these goal focused networks pre-dated the friendship focused networks, for example Deborah and Sharon became friends through their involvement with the 50+ Forum and continued meeting as friends now that there were fewer Forum meetings. Similarly, some friendship focused networks pre-dated goal focused networks, ranging from Maria and Alice who attributed their membership of the Forum and other formal voluntary groups to their friendships with Margot and Jennifer, to the men who originally met at the Town Centre Pub because:

> *we're all widowed, we're all on our own, so we come here to meet our friends and have a chat*

For this group, what started as a social group now provided what could be viewed as a vital monitoring support to people who were otherwise increasingly frail and isolated, even though it was not a formal voluntary organization. One jokingly spoke of phoning another to ask how he was:

> *I phones him every Sunday to see how he is and he says '…… terrible, I've been down the club' (laugh)*

People reported clear social benefits from participating in some action based voluntary activity. This had been a motivation of joining initially, and for continuing involvement. A man in the Village Walking Group said that he wanted to join the walking group because:

> *My wife passed away 6 months ago, and so I need something to do.*

His motivation for joining seemed to be more concerned with the social benefits than with an interest in walking, explaining that he didn't want to become involved with more serious walking groups, as he wanted to keep time free for his family and for himself. Participation in voluntary activity being triggered in response to the isolation

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[5] Refer to Chapter 7, Networks

resulting from the death of a spouse was a common feature of many people's situations.

People spoke of being involved in groups which had grown out of the formal voluntary organizations; for example, the Village Walking Group and the CAMRA Pub Rail Ramblers group, which both had an accepted social function as well as a health/exercise function.  These extra, below the radar, groups filled a similar need both for social contact and for continuing or expanding the activity.

However, the balance between social and non-social motivation for being a part of a group was a major source of friction within the 50+ Forum, with some arguing that it should not have a social function and others arguing that unless it did, people would not be motivated to be involved.  Deborah and Sharon felt that, from the outset, the Forum had had difficulty retaining members because

> *people thought it was a social club, not a lobbying group*

Both Janet and Lucia, who had also been members for many years, felt that membership had fallen from over 1,000 to just over 100 because the organization had failed to provide any social motivation for membership.  When asked why she felt people joined the 50+ Forum, Janet's initial response was:

> *I think, with elderly people, I mean, not all of them, but some of them like the forum because it's sociable, it's friendly and it's somewhere to go.*

Lucia felt very strongly that the Forum needed to provide social benefits in order to attract and retain members, and it needed to take action to recruit members by offering social incentives.  She spoke of an incident at one Executive where she proposed that they should provide free refreshments, but was over-ruled:

> *Lucia: They were asking to pay for the tea and coffee.  They say, you don't have to pay, but it's not that.  It's the principal.  We got the money there to pay, for that.  So what is the money going to be used for?*

John, the previous chair of the 50+ Forum, also felt strongly that it needed to provide social benefits to attract and retain members.  He was very aware of the criticism he had attracted because of his decision to use Forum money to pay for social events,

but believed that it was a good use of public money and that his actions were transparent:

> *John: These are volunteers and it's got to be fun.*

### Career development

There was evidence that, at least for women, volunteering had been closely associated with earlier career development, and may have been of benefit to it. A woman in the Village Walking Group spoke of being heavily involved in voluntary activity with the Free Masons which was linked to her career running a family business. Hillary, who had the greatest experience, both in terms of time and in types of voluntary activity, acknowledged that when she was younger, involvement in the voluntary sector was a means of accessing training and experience which was useful to later careers for herself and others:

> *From that (establishing a play group) a lot of people came in and went on to professional experience. PPA (Pre-School Playgroup Association) a very good training organization, could go to national training. Was member of the Children's Committee, huge, so knew how to deal with civil servants. I was lucky, very lucky. Used to go to London once a week at least to the National …. That's where I had the experience*

However, career development no longer appeared to be a motivating factor for anyone. A number, including the retired nurse at the CAMRA pub and the retired miner and hospital porter at the Town Centre pub, spoke of reaching a stage in their life where they no longer wanted the responsibility or the physical demands of their previous careers. Others spoke of deliberately avoiding volunteer work which required any responsibility, for example a man in the Village Walking Group, who had spent many years working as a Director of a major hospital in Saudi Arabia, spoke of stepping back from being a volunteer walk leader because he did not want the responsibility associated with the task:

*They nagged and nagged me to become a leader, so in the end I agreed.  But then people started phoning me at home, asking me to take extra walks because someone was away or something.  So when Groundwork stopped running it, I stopped being a leader.  The new lot asked me, but I don't want the responsibility.  I'll lead the odd walk, but not much.*

When the Council implied that voluntary work may have career benefits for the members of the 50+ Forum, their response was scathing.  For example, when informing members that, as well as additional funding for volunteering to interview people on behalf of the Council, individuals would receive training, Hillary who had held senior positions as an industrial chemist with a multi-national company, summed up their proposal with the comment:

*We will have a certificate!*

Then added

*I was tickled ….you can put it on your cv*

Alice, who had established and then managed a School of Allied Health Professions during her career, was equally unimpressed, commenting:

*I hope they get my name right!*

She then muttered that it was many years since she has thought of "updating my cv".

**A wish to retain professional identity**

Whilst no one expressed a wish to develop their careers, some appeared to be motivated by a wish to retain their pre-retirement professional identity, achieved through paid or voluntary activity.

Many of the people involved in the study:  those involved in the 50+ Forum, in the Village Walking Group, those at the CAMRA Pub and those at the Town Centre Pub, made reference to previous careers which would have resulted in their having occupational pensions or current living conditions which suggested a good standard

of living.  However, a significant number of men were still employed, and so were motivated to take action in order to increase their income.  For example, the former development officer of the 50+ Forum, Mark, was retired with a private pension but had decided to seek alternative paid employment:

*I retired, after 38 years with the police, forensics, civilian.  I was Head of Forensics.  So I finished and spent a few months at home and thought, well I need to do something, I want to do something, and saw this job, that job sorry, and I applied for it.  It was only to cover maternity, initially.  So it only went for 6 months, but ended up 4 years.*

When the post ended, Mark took up paid employment with another organization.  He may have been involved in voluntary activity as well as this, but securing paid employment appeared to be the "something to do" that he was seeking and he was able to achieve this without undertaking voluntary work first.

John, who was heavily involved in AWF and had been involved in other voluntary activity, had made a gradual move from full-time employment into full retirement, taking up a series of part-time posts, with low levels of responsibility, before finally giving up paid employment completely.  John had made a decision to leave a full-time position with significant responsibility, and he had a redundancy payment as well as a private pension.  However, his motivation to take up voluntary work came only after a period of activity which had less responsibility than his earlier career, and was not full time, but was paid.  Whilst being active was clearly important to both John and Mark, this did not provide total satisfaction:  they needed to be active through doing something which was paid.

Women who were able to continue generating an income after retirement age also did so.  Following her retirement from the NHS, Jennifer developed a private physiotherapy practice and continued with this until she was almost 70.  Lucia who had a dressmaking business, and the woman in the Village Walking Group who ran a business in partnership with her husband, were both continuing to work at the time that this study took place.  Although they did not work the same number of hours as they had previously, maintaining this employment and associated income was clearly important to them.  All three had the type of career that provided opportunities for a

gradual move into full retirement, but they also had family circumstances which supported this choice. Jennifer was single, Lucia was a widow, and as the Walking Group woman was in a business partnership with her husband, her continued working also supported his continued working. It is possible that other women would also have continued in paid employed if they had been afforded similar opportunities.

Although other members of the 50+ Forum were fully retired, and some such as Alice spoke of actively choosing retirement, retaining professional identity remained important. Hillary, Alice, Jennifer and Liz made frequent references to "being professional", which they equated with adopting the working practices which had been common during their working lives. One member of the 50+ Forum, Catherine, was clearly motivated to be involved with the Forum and other organizations because the roles were similar to those of her previous profession as a social worker. Although over 50, Catherine didn't view herself as one of the "older people" that the Forum aimed to support:

> well you see, originally, when I saw it was for the over 50s, I thought it was for , nearer, to what I was working as a social worker, the older people, helping …

Catherine no longer worked as a social worker because she had had a brain tumor. She sought voluntary work which was similar to her previous social work role, but accepted that she would not return to social work. Catherine's first voluntary activity following her illness was as a member of a multi-sector planning group, and although she found the first meeting very difficult, was motivated to persevere:

> And I thought, keep going and see if I get what they're talking about. And it did help, and I love that meeting, and you know, there are social workers on it who used to work as social workers with me. And I love going to those meetings …

Catherine was motivated by a wish to retain a link with her earlier career, partly through using the same skills, partly through having the same routines and partly through retaining links with colleagues. Her illness and enforced early retirement gave a poignancy to this source of motivation, but in other respects it was very much like others' motivation to retain their professional identity.

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### Self protection or self gain

Not surprisingly, no one suggested that they became involved in voluntary activity to protect or enhance their own ego. However, some suggested that this was a source of motivation for others. For example, the Village Walking Group man who chose not to be a walk leader felt that those who volunteered to be walk leaders often abused their position:

> the thing about older people, those that haven't had any responsibility before, is that they become something like a walk leader, they get a bit of training, and hey-presto, you've created a little monster

Within the membership of the 50+ Forum, there was an acceptance that some people may be involved for personal gain as well as for altruistic motives. In response to this question, Emma replied:

> That's what my mum is. She's 85 and she doesn't want to be an active member because of her health but she's interested in what's going on and she wants to know what the forum can do for her. And I think a lot of people think "what can it do for me?"

The belief was also shared by May, a member of the 50+ Forum who had chosen not to become an Executive member, despite being invited. May had been involved with the Forum for many years, and had also been involved in at least 5 other local and national organizations. Her views were based on her experience with all these organizations, not just of the Forum. However, with regard to the Forum she spoke of priorities changing to reflect the interests of the Chair:

> I think they just represent themselves. I do. I just think that it's very much a "Oh we'll make a noise and they'll …." Because a couple of years ago, there was a different chairman then, and it was something to do with doctors surgeries, visiting doctors surgeries, and finding out,

continues

> *What you see is just little old dears that, fills their afternoon. I honestly don't know what it is all about. Because the ones on the executive board, they have these executive meetings, but it's always to better themselves*

The belief that people were motivated for self gain was more marked when considering people motivated to take up public office, which is also a voluntary activity. Sharon referred to her belief that some people become involved in the 50+ Forum as a "step into politics …. What they really wanted to do".

During my interview with Hillary, we discussed the difference between being a member of the 50+ Forum and being an elected Councillor:

> *Llinos: the 50+ forum works in partnership with other bodies?*

> *Hillary: And let me say this, it's an extension of the democratic process. You can't have a democracy if you've only got …. But this partnership overcomes that and allows everyone to become involved.*

> *Llinos: you're not like elected members ….*

> *Hillary: No, no. And we don't get 9 grand a year for doing it either!*

There seemed to be a hierarchy of disapproval, with the Village Walking Group man feeling that everyone involved in volunteering did so for personal gain, May feeling that it applied to those involved in committee-type voluntary work, and Sharon and Hillary reserving this judgement for those volunteering for party-political based public service. Their judgement might also be shared by Jennifer, reflected in her comment to the Public Appointments Committee that she believed that they had not appointed her to a position because she was "not a political person".

Two members of the 50+ Forum, Janet and Lucia, referred to being motivated to become involved in voluntary work by their fathers' political activity, and Janet had recently been elected as a County Councillor. However, there was nothing to suggest that her long involvement with voluntary activity had assisted her political career. Conversely, Janet did make a, possibly light hearted, observation of Hillary benefitting from public recognition for her voluntary work when she had not:

> *Janet: Yeah, next year is my 50th year in the voluntary sector. Yeah, it's …*

*Llinos: a long time*

*Janet: That's what my friend said the other day. Do you know her? Oh she's lovely, she's one of our Trustees. Big fundraising , she's worked for the Hospital Fundraising for years. In her own quiet way, she's a bit like me, she doesn't tell anyone, she just gets on with it. And she said "so and so got an OBE for 20 years service in the voluntary sector".*

### Opportunities to take responsibility and risk

Although some people actively avoided volunteer roles which required taking responsibility, others chose to become involved in volunteer activity which was not organised by a formal voluntary organization because the consequent lack of structure allowed them to have more responsibility for themselves. For example, the Rail Rambler group at the CAMRA Pub were not on an "official" Rail Ramblers walk. This group walked on alternate weeks, outside of the official walking programme. One aspect of this was that the walks were not walked out in advance by the walk leader, and they were not covered by Ramblers Association insurance. Consequently, there was always a risk that the group would get lost, as they had on the day that I met them. Also the walkers were not insured, and so the person leading the walk was at risk of being sued should anyone suffer an accident or injury during the walk. However, even though it was a very cold, wet day in February and they had walked for around 15 miles, including several steep ascents on potentially dangerous terrain, taking on physical and mental challenges, being free from others' rules or regulations appeared a major motivating factor.

Rather than increasing age leading to a wish to undertake activities which carried less risk than those undertaken previously, a number spoke of age bringing increased confidence and willingness to take risks. Bronwen, a retired teacher who was now a member of the 50+ Forum and active in many other groups, said of herself:

*And when I was in my 20s and in my 30s, perhaps I wouldn't say very much at all, but I was away then in Wigan, teaching, you know. But I came back and I've been involved, I've gradually become involved in more and more around here, you know. And I've got to the stage in my life now, where I say what I think, very politely, you know. And I was saying to somebody the other day, if I'd felt like this 30 years ago, I would have gone on the Community Council, and I go to their meetings.*

Liz, another Forum member, described going to great effort to secure public appointments following retirement, and not being discouraged by the associated bureaucracy. Liz secured appointments by making individual applications, and was finally invited to apply for a position on the Community Health Council.

*And during that time I was having surgery on my feet anyway, so I was using the health service, so I thought I was in a position to comment on it. And I did. Because when I was in hospital they left us with no pain killers, not me but the whole ward. "Lost in the pod", that kind of thing. So I made a fuss, and I asked to see the sister, and nobody else would do it, but I would. And the pharmacist came to see me and apologized, and I said "well thank you for coming to see me, but I'm still going to make a complaint when I get home, because it's wrong". I mean, before you come in they give you books saying that you must not suffer pain because they've got pain relief and all of this, and when we asked for tablets, they're not available. I said, "this is an orthopaedic ward, you should have a bucket of painkillers in the middle of the ward and issue them like sweets". Well anyway, I didn't get a satisfactory answer, but I brought it to their attention, and hopefully it saved somebody else.*

Liz spoke freely of writing and telephoning the Council about Forum issues, without being requested to do so by the Executive, and almost all of the Forum members interviewed spoke of taking action on behalf of other older people without considering a need to discuss it with the Forum executive first. Increasing age appeared to be giving this group increasing, not decreasing, confidence to act independently. Being a member of the Forum provided a means, or a rationale, for acting for or representing other older people. Finally, as with the extra-Rail

Ramblers group, the extra-Village Walking Group and the Town Centre Pub group, the lack of formal structure within the 50+ Forum allowed group members greater freedom to act on their own initiative and to take more risks than would be the case if they were volunteers within larger, more formal voluntary organizations.

### *Upbringing, parents and social position*

Within the membership of the 50+ Forum, many had been brought up by parents who had been active volunteers.  Jennifer spoke of being "brought up in an atmosphere of voluntary service", whilst Janet spoke of a childhood based around music, politics and associated voluntary work.

Lucia spoke about her early life in Sicily where she was brought up to help other people, and so she brought her own children up to do the same.  Like Janet, Lucia's early voluntary work was closely associated with her father's political activity, and this appeared to have given her confidence as well as motivation to express her personal values:

> *I don't have any problem there because, I, as I say, I've always been in different sort of organization like that.  And I've been involved with different social level, I know there's …. But there's the social, different, in some sector. But I can be at the same level (laugh).  But I can be at the same level too. They don't intimidate me.  I grew up …. My father was involved in politics, so I'm used to (laugh)*

However, Alice, Emma and Hillary spoke of not being involved in any voluntary activity until they were adults.  Alice attributed her later involvement to her friendship with Jennifer and to the additional time she had following her retirement.  Emma and Hillary felt that their lack of involvement during their youth was due partly to their parents being very busy and partly to there not being opportunities in the communities where they lived.    Hillary was very aware that both her and her parents' ability to be involved in voluntary activity was influenced by personal

circumstances and necessity as much as by concern for others or a wish to protect or enhance one's personal situation.  Of her parents and childhood she commented:

> *Parents involved?  Not at all, there wasn't that opportunity really.  My mother was an active member of the church, my father didn't do anything like that, so there wasn't …*

Hillary was frank about the impact that her change in social circumstances had on her opportunity to be involved in voluntary activity:

> *I suppose we were living in a certain geographical area, with a certain area – this area.  I went up a notch really.*

Hillary attributed her ability to become involved in voluntary activity to her employment and social position, which were very different from her parents.  She viewed the opportunity to volunteer to be a privilege which wasn't open to them.

### Gender

It is possible that Catherine's brain tumor placed her in a position where she felt it was impossible to secure alternative paid employment and so had moved directly from full-time employment to voluntary work.  However, her strong wish to retain her professional identity did not appear to be linked with a wish to continue earning money, as was the case with John and Mark.  This and other matters raise questions of the influence of gender on people's motivation to become involved in voluntary activity.  However, there was little consensus.

With the exception of the 50+ Forum, all the groups had a mixture of male and female members, although there was not an exact balance of the two.  The 50+ Forum was unusual in that it had no men as members at all, and had not attracted any for some time.  This was discussed at the AGM, and during interviews.

The AGM was attended by 17 people, which was a far lower number than had attended previous AGMs.  Only 4 of the people attending were men, one of these

was the Mayor and one was the Chief Officer of the CVSC. During a discussion on membership, Lucia raised the matter:

*Lucia: We're lacking in men*

*Hillary: I don't think we should worry about it really (laughs)*

*Lucia: I think we need a couple of men, otherwise we become like the WI*

Hillary didn't respond to Lucia, but moved on immediately to clarify the voting rights of Associate Members at Executive meetings.

During our interview, Lucia spoke further of her belief that the Forum needed to have men as members because they brought different experiences and they could appeal to different groups of people. Lucia suggested that men had resigned because the meetings were chaired in a way that didn't give them, or anyone, an opportunity to contribute different ideas and discuss matters.

Emma and Elaine agreed with Lucia that the Forum should include men, but were unsure why men did not attend. Elaine felt men should be encouraged to join, even though she admitted to not having a positive view of men generally

*I know I'm a bit biased towards fellas, I must say. But we do need the male input because, like it or not, men do see things differently, and I do want the male input. But we can't force them. And you do see, at the meetings, it's predominantly women who come, and I don't know how to encourage males.*

Emma and Bronwen both referred to men having been involved in the past, but either dying or leaving due to deteriorating health. Alice generally had a jovial nature, so her comment should not be interpreted as totally unfeeling. However she didn't seem particularly concerned about the lack of men:

*Well they had 2 men but we've killed them both off. One, oh bless his heart, he wasn't a great deal of use. And John and Kenneth opted out, when John went Kenneth went, mind you Kenneth had deteriorated sadly, hadn't he? I don't think he was able.*

Jennifer gave the matter a little more thought.  Although she felt that deteriorating health was a factor, she also felt that activities such as the Forum were of greater interest to women than to men.

> *Women are more interested in social work I think than are men.  And of course there are more widows than there are widowers, so you are likely to get more females.*

Maria spoke of her own husband not being interested in being involved with her various voluntary activities, both action based activities such as volunteering at the hospital, or committee-based activities such as the Forum.  Her husband helped care for her recently widowed sister, including doing her gardening and her shopping. When I suggest that her husband could join her at meetings, Maria responded with a laugh:

> *He doesn't mind running me there.  And if I said to him, yes come in …. At the AGM I might say to him, come in, make up the numbers … he might do, he's pretty good like that, but he's more interested in gardening, and going up onto the moors, he likes the moors and things like that.  But, we'll see (laugh)*

> *He went, on the meeting on Monday, he just sat in the car while I went to the meeting.  He did go to Tescos to get me some salad, but he just sat there and read a paper or something.  He's good like that, he's very good like that. They don't mind you doing it, as long as they don't have to get involved.(Laughs)*

As well as being the chair of the 50+ Forum before Hillary, John was also the last man to have been actively involved with the Forum.  He left the organization, along with his close friend and associate, Kenneth, when he stopped being chair although they both continued to be involved with AWF at a regional and national level.  In our interview, John spoke of particular concerns of men, for instance when speaking of luncheon clubs he spoke of their providing a means of combating the social isolation which many older men face:

> *I think the biggest gainers of that are men, it's true.  You see once a week they have to get washed and dressed and shaved to go out for lunch.*

However, John also spoke about matters concerning women and was interested in promoting their interests. John's departure from the Forum was acrimonious, and he felt that the current membership did not wish to encourage men. He felt this was partly because of Hillary's chairing style:

> *They don't want them, it's patently, bloody obvious! You see, Hillary, you've got to credit Hillary (tape unclear) –If you want to drop, if you want to, if you want to choose someone to do ….. you don't say to them "I'm sorry, you don't know what you're talking about". Because once …. They'll shut up, they won't contribute to the meeting, anything. (Tape unclear ) Well it's not nice to …. Any trainer will tell you, never say to someone "you're wrong", but "yes that's right, but don't you think that …." Is a much better way of doing things. A much <u>kinder</u> way of doing things, shall we say. But even …. You can't be the only fella in a room and then be (tape unclear) because your punctuation's crap. Well, you know, I'm sorry. You don't go back a second time, do you?*

John believed that the previous style of Forum meetings was more encouraging. He adopted an informal style when chairing AWF meetings, and believed that this was one of the reasons why men attended.

Hillary made many references to her professional experience within a multi-national organization and of transferring her skills and knowledge to her voluntary roles. However, unlike Alice and Jennifer, Hillary had married and consequently given up her career as an industrial chemist. Unlike a number of members of the Forum, she had had a long and happy marriage and so did not share Elaine's experience of "being a bit biased towards fellas". Hillary's description of herself first becoming involved in voluntary work was of someone in a very traditional role of wife and mother:

> *It happened because I became involved in setting up a playgroup for my daughter ….. read in Guardian, read about pre-school, asked husband, he said yes, he always said yes …..*

Hillary shared Maria and Jennifer's view that men's interests may lay elsewhere:

*We do have a couple of men who dip in and out, but you see men over 50, they all think, (pause) they play golf*

Hillary conceded that perhaps the Forum should take action to encourage men, and that some may find it difficult being in an organization where they were in a minority:

*And maybe, maybe we don't encourage them, perhaps we should have a …… to encourage them*

*Continues*

*I'm sure one of the things, in the majority, if you're one man among 12 it is difficult, if you're not used to.*

However, Hillary felt that the reasons for men not being members were due to general reasons and not due to her personal style:

*I was chair of a national voluntary organisation, most of our exec members were men.*

As development officer, Mark had been involved with the 50+ Forum before John's period as chair as well as before Hillary.  He had found that the Forum had always attracted more women than men, regardless of the style of the Chair, and he could provide no clear reason for this:

*Yeah, we had … mostly.  There were 3, maybe 4 guys on it.  Couldn't attract them for some reason.  We'd get some, they'd come along for a while, but then ….. We never really got to the bottom of why.*

For men like Maria's husband or the Town Centre Pub group, who had spent years working in conditions which were demanding and sometimes dangerous, it is understandable that they now wished to spend their time playing golf, chatting in a pub or walking on the moors.  Furthermore, the comments and actions of all the groups involved in this study suggest that Maria's husband was not unusual in supporting his wife to take part in voluntary activity or in personally choosing to do voluntary work on a "below the radar" community level but not through established voluntary organizations.  There is little to support Jennifer's assertion that women are more interested in taking action to benefit society than men, although there is

evidence to support the assertion than women live longer and so are likely to make up a greater proportion of any group.

For some women, becoming involved in voluntary groups such as the 50+ Forum gave opportunities to develop and use skills which had not been afforded to them otherwise.  This included opportunities to take risks, in the form of taking leadership roles or speaking out. Hillary and Alice were unusual in their age group for having had careers which gave them leadership positions in male-dominated organizations. They had both been very successful in their career, which suggests that their manner had not posed any difficulty for their male colleagues during this period.  Any difficulty appears to have occurred when they transferred their skills and behaviours to settings where men were no longer in the majority, and with men who had little or no experience or working alongside such women.

### *Shared place*

Being part of a group with shared experiences or memories of living in a particular place did not appear to be a strong motivating factor.  The groups at the CAMRA and Town Centre pubs travelled significant distances away from their home communities. Whilst most of the Village Walking Group had lived in the area for all of their lives, some had not and appeared to have equal status within the group.  Notably, one woman, who was a walk leader and actively involved in other voluntary activity with members of the group, had moved to the area from Lancashire more than 40 years ago and still had a strong Lancashire accent.  She had moved to the area to marry a local farmer, who wasn't in the walking group but was well known to the members. This woman never made reference to being involved with local churches or chapels, and was never observed speaking Welsh, although she participated in discussions where some spoke in Welsh and others spoke in English.  She made frequent references to meeting her relations from Lancashire, but also seemed very established and a part of the local community.

Forum member Bronwen was the only person who spoke of being motivated to participate in a particular activity because of its links with the area where she lived. As well as being a member of the Church Council, Bronwen spent time visiting housebound parishioners, and it was this existing commitment to Church activities that deterred her from taking on more activity with the Forum:

> *And I have about half a dozen elderly people who used to go to church, and they can't go now, you know. And mostly, perhaps there's 3 of them in church now who know these people and have known them for many, many years. And they don't really like other people because, you know they say, "well I asked him about ….. and he can't tell my anything!" and I say "well, no, because he has only lived here about 10 years" (laugh) So, 2 of us, 3 of us, we've got together a little group, so I don't want to take on any more of that sort of thing, you know.*

Within the 50+ Forum and AWF, most members shared the experience of being from outside the area even though most had been living in the area for more than 10 years, many for over 50 years and some for most of their lives. Those who were English had not acquired Welsh accents and many were at pains to emphasize that they were not from the area. For example Emma moved to the area when she was 2 ½, but pointed out that she was born in London and that her "mother's mother came from Kent". Although Emma shared an experience of living in the area for more than 50 years with the sisters Maria and Margot, Emma referred to Maria and Margot as "the two London ladies", noting that Maria used to live in Balham "and I spent a lot of my life there". She felt connected with them through their links with London, rather than their links with the area.

### *Cultural identity*

Whilst opportunities to be with people who shared a particular geographic location may not have been a great motivating factor, sharing experiences linked to cultural identity did. For many, this identity combined characteristics of faith and language as well as place of origin, and it was often difficult to separate these. For example, Lucia was involved with the Roman Catholic church, which appeared to be strongly associated to her links with the local Italian community and her Italian identity. It was not possible to judge the extent to which Lucia was motivated to attend the Church because it was a place for her to practice her Catholic faith, because it was a place where she could speak with people in Italian, or because it was a place where she would meet others who shared her experience of moving to Wales from Italy shortly after the Second World War. However, some of Lucia's voluntary work specifically involved people who shared her Italian identity, for example helping Italian women who had been resident in the UK for many years, but were now having to deal with the Italian consulate for the first time as a result of widowhood.

This combination of characteristics of faith, language and cultural identity as a motivating factor for being active within a community was apparent in those who identified themselves as Welsh. At one Forum meeting, Hillary interrupted a visiting speaker who was inviting members to attend a meeting at a community centre in a converted Welsh nonconformist chapel, Capel Ebiniser. The venue had been renamed The Glass House because, in the words of the speaker, this made the venue "more accessible". Hillary interrupted, stating:

> *May I say, as someone of a religious persuasion, that I object to the change of name!*

Hillary went on to speak about how she came from that area, and that the chapel name was an important part of its character and history.

Bronwen appeared to be part of a community within a community, who knew each other because of their shared language and involvement in Welsh cultural activities. For example, when speaking of her three local councillors she said:

*But you never see your councillor, this is the thing. I mean, around here …..
We have one councillor who's very good. Very, very good. He comes to
events, he's in the supermarket, he's visible. And you know, if you've got a
problem you've only got to speak to him and he will bring it up at the
Community Council, and he will get something done, you know. He's very
good. One other one I know, because he's Welsh. And the other one, I've no
idea who he is, any idea at all.*

Bronwen knew one because he was active in the community, she knew one because
he was Welsh. She did not know the third because he was not active in the
community and neither was he Welsh.

On retirement, John had deliberately sought voluntary work but had also decided to
move back to the area. John explained this decision as:

*'Cause it's a funny thing being Welsh, you want to go home.*

However, not everyone who was born in the area shared this identity.. One member
of the Village Walking Group spoke of changing her religious denomination, which
then had an effect on the voluntary activity she was involved with, because she and
her husband wished to worship together. The woman said that this was because she
"didn't always understand the Welsh", which I found surprising as she often
conversed in Welsh with other members of the group. Although her spoken Welsh
was of an acceptable standard in the informal setting of the walking group, she did
not feel it was of a high enough standard for her to feel a part of the more formal
chapel congregation. Although "born and bred" in the area, Jennifer described
herself as British rather than Welsh. Janet spoke of only speaking Welsh in primary
school on Fridays, and later choosing to study French rather than Welsh because it
was "much more romantic". Liz had no empathy with CHC colleagues wishing to use
Welsh at meetings, which had led to her deciding to stop attending:

*and I'm all for Welsh, I've tried to learn Welsh, but they come to the meetings
and they want it all in Welsh, so there's the cost of the translator, which I
suppose is ok, there's money in the budget for it and so on. But it makes the
meeting twice as long,*

*continues*

*So I think that going is a waste of time.*

Hillary, who was in many ways proud of her Welsh identity, was not always supportive of the Welsh language being used.  During discussions of preparations for the AGM, one member spoke of the Council's requirement to produce documentation bilingually and asked if anyone had "good enough Welsh" to translate.  Hillary's immediate response was:

*I have good enough Welsh to translate the minutes.  I don't have good enough time!*

Hillary went on to list various statutory sector services which did not provide written material in Welsh, or provided it to a very poor standard.  She concluded that this was another example of statutory bodies "asking too much of volunteers" by expecting them to do things which statutory bodies did not do themselves.

**Being able to get there ….. public transport**

Having a shared interest, possibly but not necessarily linked with cultural, religious or professional identity, appeared to provide a greater source of motivation than being in the same place.    The Village Walking Group was made up predominantly of people from the village, although at least 4 travelled up to 12 miles to join the walks. The 50+ Forum and AWF groups were made up of people from throughout the county borough, requiring public transport or cars to attend meetings.  Similarly, the rail rambler group at the CAMRA Pub was made up of people from a very wide geographic area, spanning a 50 mile area.  They came together because of an interest in walking rather than any common sense of identity associated where they lived, their language, religion or faith.

However, whilst shared interest provided motivation, in many cases this was supported and sometimes entirely dependent on the provision of free public

transport.  The activity of the CAMRA Pub Rail Rambler group was entirely dependent on public transport, and all the people interviewed said that they were only able to participate because they were entitled to free or subsidised transport.  One member of the Village Walking Group spoke of a friend who had "always been a bit of a loner", who had become more sociable and outgoing apparently as a result of having a bus pass.  The friend now regularly visited people and places:

> *Even Barmouth!*

The woman in the Village Walking Group who originated from Lancashire frequently met with friends and family, and she felt that this was entirely due to her access to free or subsidised public transport.  She did not drive, and said that she could not have afforded to make so many journeys if she had had to pay the full cost.

The Town Centre Pub group travelled as much as 30 miles to get to the town.  When describing how they spent their time, as well as meeting in the town they also spoke of going on to other destinations.  The farmer from the North Wales coast usually spent his afternoons in a town a further 20 miles south, visiting the markets and then another pub where he regularly played billiards.  One of the group summed up their position:

> *You couldn't do anything without them …… the cemeteries would be full if they didn't give us the bus passes*


Deborah and Sharon spoke of their own reliance on free transport, and also of how proposals to remove the benefit was a major concern to many people:

> *Without free buses, most people would only go out once a week.  At least 60% would become isolated, we know that from talking to others.   ……. Go out, have a ride, stop for a coffee.  You see them sitting on the square, on the benches, chatting away.  You come back later and they're still there.  It's one of the big issues.  People were depressed that they would be taken away*

Some people spoke of the inadequacy of the bus service.  For example, Liz said she preferred to use her car because the bus service was inflexible where she lived.

Bronwen felt that lack of good transport was a reason why people found difficulty attending Forum meetings, even though they could claim expenses for attending.

The process of claiming expenses for attending Forum meetings was discussed at every meeting observed.  There appeared to be common agreement that difficulty finding a venue which was easily accessible to everyone was one reason why the Forum failed to attract people to meetings.  The challenge was not inspiring or making people interested in the work of the 50+ Forum, the challenge was finding a convenient place to meet.

### *Shared interest in addressing age discrimination*

The people interviewed at the CAMRA Pub, Town Centre Pub and the Village Walking Group did not appear to view themselves as limited due to their age, although they all made use of their bus passes and so did not always view being categorised as an "older person" as a negative thing.  There was an awareness of and sympathy with older people who were not as healthy or as financially secure as themselves.

Although people involved with the 50+ Forum generally were motivated by a wish to improve things for other people, there was less agreement of whether people's position needed to be improved because of their age, or because of reasons which were common to others regardless of age.  Elaine, who was a Trustee for a parent and child national voluntary organization, volunteered with other groups and had a disability herself, was clear in her view of the purpose of the Forum:

> *To highlight the problems of the over 50's really, to try to do something about it, and to pass out information to people about what's going on*

However, Elaine was not supportive of separating the needs of older people from those of others:

> *I think it's a big mistake to separate people out, that age group, that ethnic whatsit, whatever, we're all people, we all have problems, and age is not*

*really a factor except that in the over 50's you have a higher factor of health problems than you do for the under 50's, but there are 5 year olds that go around in wheelchairs which are unable to do this, that and the other for themselves, the same as there are 90 years olds who can't do this whatever for themselves. So I don't think you should segregate people out. I think you should have specialities in that, you should have over 50's because I understand over 50's, because I am an over 50 myself, but interact with other people because it's awfully good to have all the different age groups to learn from each other.*

Elaine viewed herself as a "specialist" in a movement to improve the lives of many groups of people.

Others wanted to help older people specifically. This was a main source of motivation for Catherine, though this was because she had been a social worker involved with older people and wanted a role that was similar to this. Lucia spoke of her belief that older people were in need of help, giving examples of people that she knew:

*Because living next door to the flats here, 'cause they're mostly elderly people. I'd love to go there and bring them all out. There's a couple, they do come out. But the rest of them, they're there. And when I go in the back, because our back goes right down, and you see them in their back. And they look to me like prison, people in prison. And you feel so bad. And I give them a wave and that, been involved with a couple of them, and I think, as us older people, as we are part of that group, we should be doing something to bring these people out.*

John, both during the interview and during observed AWF meetings, showed a strong belief that older people were in a vulnerable position because they were older people:

*You've heard about the latest crap from the government, about pensioners have got too much money. And then you hear them saying, pensioners need to work longer, up to 67, 69 years of age. And then they say, forget the free bus pass, and then they're living too long. And the latest one now is,*

*excuses, get bloody euthanasia going. You're taking our jobs. We need the bus pass, we don't work, you're old and have got all the money. Now that is serious, because it's only a short way to being violent. Now I believe, unfortunately, the government, whatever colour you want, is trying to detach itself from where the problems are. And they're happy to deflect it anywhere they can at the moment.*

During our interview, and during observed AWF meetings, John was very open about his own age, his financial position and various disabilities which he attributed to his age. He therefore appeared to include himself in a group that he felt was increasingly vulnerable, to the extent that they might face violence and death. Many of the statements which John made were extremely disturbing, but he was never challenged on them, and most people appeared to nod in agreement rather than dismiss him for exaggerating. Notably, John's resignation/removal from the 50+ Forum was, ostensibly, not due to his making such statements, but due to his arranging too many informal events. Although others did not make such statements, there was never a suggestion that people didn't agree with them or believe that they were not accurate.

## Conclusions

### *The heartfelt satisfaction of contribution and feeling a part of the community?*

There were many examples of people being motivated to become involved in voluntary activity because of the social rewards, as described by Okun & Schultz (2003, 231) and by Lie et al (2009, 13). Opportunities to become involved in volunteering, and motivation to become involved possibly for the first time ever, appeared particularly important to those who were recently bereaved of a spouse. Many people were motivated to become involved in voluntary activity because it gave opportunities to learn, experience something new, or practice established skills. There was also a pattern of people feeling more confident with age, more willing to take risks, and consequently motivated to participate in organizations which were not

too restrictive or even to set up their own, below the radar, organizations.   Contrary to Cattan's findings of people being motivated to volunteer because of positive past experiences of voluntary activity (2001), many were involved with committee type activity for the first time in their lives.  Sometimes this was attributed to having additional time due to retirement, but many attributed this to their growth in confidence which they associated with growing older.  This reflects Burall & Shahrokh's findings of people being discouraged from volunteering within organizations which are complex and restrict individual action (2010, 9). It also gives support to Seaman's finding that people of the "Baby Boom" group could not be assumed to be willing volunteers on reaching retirement (2012, 252).

Unlike Suanet (2009), the data did not show a strong link between a decision to volunteer and practicing church membership.  Of those who were active members of a religious group, their faith appeared to be an important motivating factor.  However, it was difficult to separate religious faith from cultural and/or national identity, for example associations between Welsh and Chapel Non-conformist faiths, Italian and Roman Catholicism, or British/English and Church in Wales / Anglican faith.  Those who were clearly motivated by their faith also identified strongly with their national cultural identity.  However, these findings concur with Suanet  that individuals' personal experiences and circumstances are more influential than parents' education, involvement in volunteering or religious practice on their decision to take up voluntary activity. Instead, those who were not introduced to voluntary activity by their parents viewed the opportunity to do so to be a privilege which had not been afforded to their parents or to themselves in their earlier lives.  Sometimes this was associated with greater free time brought about by retirement, but it was also associated with greater wealth, improved education and improved social conditions.

Finally, access to affordable public transport had a significant influence of people's ability and motivation to take part in voluntary activity of all types.  Much below the radar activity was dependent on this, for example the support which the men at the Town Centre Pub gave to each other, the maintenance of friendships with people who now lived far away, or the extension of walking and social activities beyond those prescribed by official voluntary groups.  This suggests both that the provision

of such benefits generates involvement in voluntary activity, and that if this benefit were removed, many people's voluntary activity would end completely.

***Working for the wellbeing of future generations?***

Although people generally acknowledged that they gained personally from their involvement in voluntary activity, they also spoke of being motivated in order to help others.  Whilst some who were not involved in the Forum or AWF expressed a lack of trust in the process, as suggested in IVR studies, those involved in the Forum had initially been motivated by a belief that the organization would achieve good.  This reflects Day's findings (2006, 3 & 8), that whilst the majority of people may feel that they have little influence over decision-making, the overwhelming majority wish to have greater influence.

Whilst concurring with earlier research regarding the place that a wish to contribute to the good of society or availability of time has in motivating people to engage in voluntary activity, this research identifies factors which are specific to older people. Growing older was recognised as a potential source of discrimination and so a reason for becoming engaged in voluntary action, possibly for the first time. Rather than a wish for career development, maintaining a professional identity associated with earlier life, such as through continuing to earn money or through holding onto practices and traditions adopted in an earlier career, was important to many. However for the participants in this research, growing older was not viewed as something to be ashamed of and so disassociated from.  Many people associated growing older with an increase in confidence and a willingness to take risks.  They sought opportunities to express this, and avoided voluntary activities which were administratively burdensome or put limits on individual choice of action or expression.  They valued support such as free bus travel, which allowed them to take action for themselves even though it also identified them publicly as an "older person".

The reasons for people deciding not to join a 50+ Forum did not support Gallagher's conclusion that such participation may be interpreted as a form of weakness (2009),

that it was because people did not wish to identify themselves as "older" because of its negative associations. The willingness, enthusiasm and sometimes aggression with which people used and boasted of using their bus passes suggested that being labeled an "older person" was not necessarily viewed as a weakness.   However age discrimination which had been observed or experienced personally, was the reason given by many for becoming involved in committee-based voluntary action for the first time.  Furthermore, this high level of concern with age discrimination appeared greater with those who had only recently become involved (for example Sharon, Deborah, John and Bronwen), than those who had a long history of involvement with voluntary activities (Hillary, Alice and Jennifer) and who were the older members of the group.  Although, as suggested by McAdams & Logan (2004), long-retired people had an established pattern of "working for the well being of future generations", these findings add weight to Seaman's conclusion that people of the Baby Boom population will be motivated to volunteer for personal rather than altruistic reasons.  In this case, they were motivated through having a personal interest in combating age discrimination.

### *Not part of the elite?*

Also contradicting Cattan's findings of people being motivated to volunteer because of positive past experiences of voluntary activity (2011); these findings include examples of negative experiences of volunteering deterring people from volunteering, or limiting their choice of voluntary activity.  This was most notable in the area of voluntary political activity, where Lucia and Janet's motivation inspired through their parents' example was countered by others being deterred because of observations of people volunteering for personal gain.

The data suggest differences in motivation associated with gender.  There was reflection that women tend to live longer, and remain in good health, which may account for their over-representation.  A number of women interviewed felt that men were predominantly motivated to do things which were self-serving:  this was sometimes said affectionately, it was not always critical.  However, men were members of AWF, had been members of the 50+ Forum, and there was plenty of

evidence of men helping others through informal, "below the radar" activity, suggesting that some men were motivated to take action to help others.  Both women and men spoke of men being discouraged from being involved with the Forum because of the style of the current Chair, or because men generally did not like being in a minority or having a woman in a leadership position.  The power relationships between individuals will be considered in Chapter 7, but there is not sufficient evidence to conclude that men do not become involved in organizations such as the 50+ Forum simply because they are men.

The data were collected in towns and villages  with a tradition of being an area that people move to and away from.  Consequently it is not surprising that people did not appear to be motivated to become involved in voluntary groups because of their association with the local culture or identity.  Even the Village Walking Group, which was based in a Welsh speaking area and whose membership was predominantly people who lived within walking distance, attracted members from outside, including those who did not speak Welsh.  Other factors such as opportunities for socialising appeared far more important.  Of greater note is that the majority of members of the 50+ Forum originated from outside the area, and most of those who were from the area or had lived most of their lives in the area often did not identify themselves as Welsh and often had little empathy with Welsh language or culture.  Those who had been born and lived their whole lives in the area, including those who spoke Welsh, showed no enthusiasm for promoting use of the Welsh language within the Forum.  Any suggestion that Welsh should be used was more likely to be viewed as another unrealist imposition by statutory bodies than an encouragement to promote Welsh identity . Furthermore, the two Forum Welsh speakers, Hillary and Bronwen, had strong social networks with other Welsh speakers.  These were comparable with those of the Village Walking Group members, and also with Lucia's links with the Italian community.  As concluded by Prys (2010, 191), this suggests that people, in this case Welsh and Italian, may be motivated to join organisations that accommodate their language needs and preferences.   The Forum did not accommodate the language needs and preferences of Welsh speakers, but Welsh speakers were able to meet these needs elsewhere.  There was a mild, but detectable, trace of some Forum members feeling superior to Welsh speaking communities, of believing Welsh speaking communities to be limited in their outlook

and experience, or of them being unwelcoming.  This might bear comparison with Prys's conclusion that Welsh-speaking third sector service users are not willing to ask for, or demand services in Welsh (2010, 197).  However, as  with the question of motivation associated with gender, the possible reasons for the low representation on the 50+ Forum of people who strongly identified with Welsh language and culture, are more complex than being simply because they are Welsh.

The findings concur with those of Okun & Schultz (2003, 231) that motivation to meet career functions decreased as people grew older.  This was the case both for those who had taken up voluntary activity in later life, and for those who had been involved in voluntary activity for many years and acknowledged that doing so had benefitted their earlier careers.  What this study has highlighted, which was not discussed by Okun, is the motivation to retain an earlier professional identity.  Retaining the professional identity associated with an earlier period of life was the main motivator for Catherine, whose employed career had been ended due to ill health rather than age.   The incidence of people choosing to continue to seek paid employment rather than voluntary activity, even when they may have been financially secure, suggests a link between paid employment and professional identity which voluntary activity could not match.  Regardless of the rewards voluntary activity may have brought, the potential non-financial rewards of having paid employment were greater.

This desire to retain professional identity, or at least the desire to "be professional", was an underlying cause for the friction within the 50+ Forum.   The current, very formal, form of operation had led to a fall in membership and to what Skidmore et al described as a "community elite"(2006, 22).  Chapter 7 will consider the questions Skidmore asks about whether such a structure interacts with, or is embedded in "the places and organizations in and through which people actually live their lives". Although it could not be concluded that people were motivated to become, or remain, involved with the Forum purely for personal gain, this desire to maintain a professional identity clearly motivated some members' involvement and dissuaded others from becoming involved.

### *Going beyond motivation*

This Chapter has gone some way towards resolving questions of why people generally, and older people in particular, may be motivated to engage in voluntary action. Questions of why some older people choose not to engage with the structures and mechanisms developed to give them a voice in decision-making remain. People may choose not to be involved in a committee for many reasons, such as it may not give the social rewards they seek, or because they prefer to take direct action. Motivation to maintain professional identity was clearly very strong in some instances. However why this strongly held motivation was able to become a rationale for the 50+ Forum acting in a way which deterred others from participating in a mechanism established to give them a voice, remains unclear. Questions concerning the lack of representation of some groups also remain unresolved.

# Chapter 6 - Legitimacy:  What gives me the right to speak for others? …… and does anyone listen?

## Introduction

Whilst the previous chapter considered why people should be motivated to speak or act for others, this chapter considers legitimacy:  why people believe they have a legitimate right to speak or act for others, and why other people listen to them and act on what has been said..  As many multi-agency partnerships involved in planning or service delivery include lay people in their membership, it seeks to address why these individuals, and the partnerships as a whole, view them as the legitimate representatives of others.  Whilst identifying reasons for supporting or justifying a person's claim to have a legitimate right to speak or act for others, the chapter also identifies contradictions, with a source of legitimacy being accepted in some circumstances but rejected in others.  Ultimately, the chapter concludes that legitimacy is a retrospective attribute, only being awarded or recognised after a goal has been achieved.

## Theories of Legitimacy

### Weber – "The institutionalization of authority"[6]

Co-production is based on what Weber describes as "social relationships":

> "the existence of a probability that there will be, in some meaningfully understandable sense, a course of social action"

> Weber (in translation) 1947, 118

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[6] Weber and others' theories of power are considered in detail in Chapter 8

Action is taken as a result of the relationships between people, and the actions of each person take account of the actions of others. The content of these relationships may be varied: Weber writes of "conflict, hostility, sexual attraction, friendship, loyalty, or economic exchange" (p118). Also, it is important to note that Weber does not suggest that the subjective meaning of a social relationship needs to be the same for all the parties involved:

> "there need not in this sense be 'reciprocity'. 'Friendship', 'love', loyalty;', 'fidelity to contracts', 'patriotism' on one side, may well be faced with an entirely different attitude on the other"

> 119

However, it is within these social relationships that the orders of one party are given legitimacy and so followed by others. Weber suggests that orders are ascribed legitimacy for one of three reasons:

1) Tradition
2) "affectual attitudes", that is, people have an emotional wish to do so
3) The orders are recognised as "legal"

> 130

Legality may derive from the voluntary agreement of the parties involved, but it may also be imposed by one party onto another. However, Weber concludes that it is this belief in legality that is the most usual basis for legitimacy:

> "Today the most usual basis of legitimacy is the belief in legality, the readiness to conform with rules which are formally correct and have been imposed by accepted procedure. <u>The distinction between an order derived from voluntary agreement and one which has been imposed is only relative. For so far as the agreement underlying the order is not unanimous,</u> as in the past has often been held necessary for complete legitimacy, <u>its functioning</u>

within a social group will be dependent on the willingness of individuals with deviant wishes to give way to the majority.  This is very frequently the case and actually means that the order is imposed on the minority"

132, my underlining

This theory that people within a social relationship follow the orders of others because of reasons of legality which may be accepted voluntarily, but which may also be imposed or simply not challenged, presents a useful starting point when considering legitimacy within co-production.

## *Legitimacy within commercial settings*

Theories concerning legitimacy, of people's right to act or to be taken notice of, exist in literatures other than those concerned with partnerships, collaborations or co-production within social policy settings such as the Strategy for Older People.  For example, stakeholder theory, which has been developed in both Corporate Communications literature and Relationship Marketing literature since the late 20th century (Egan 2012, 1), includes discussion of legitimacy as an attribute of stakeholders.  Stakeholders were initially described by Freeman as "any group or individual who can affect or is affected by the achievement of the organization's objectives" (Freeman 1984, 46).  The advantages to be gained by commercial organizations recognising, engaging in and exploiting potential stakeholder relationships were quickly recognised, as in De Bussy's observation of the impact of (then new) internet technologies on marketing, that:

"Where conditions of trust, trustworthiness and cooperativeness exist between organizations and their stakeholders, opportunistic behaviour is minimized and the contracts between the parties may be executed more efficiently, thereby reducing costs and creating a source of competitive advantage."

(Debussy et al 2003, 14)

At the same time it was recognised that whilst some people can affect or be affected by the achievement of an organization's objectives others can not, and others possibly should not. "Legitimacy", as a right of someone to affect or to be affected by an organization's objectives, has consequently come to be considered as a possible attribute of stakeholders. Defined by Suchman as:

> "a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of forms, values, beliefs and definitions"

(Suchman 1995, 574)

legitimacy has been viewed by some authors as an identifiable and measurable commodity. However, this is not to suggest that legitimacy is the only attribute of stakeholders, or that it is a necessary attribute. When considering "who and what really counts", Mitchell et al suggest that there are 3 stakeholder attributes: legitimacy, as defined by Suchman, power, as defined by Weber[7], and urgency, defined as existing:

> "only when two conditions are met: (1) when a relationship or claim is of a time-sensitive nature and (2) when that relationship or claim is important or critical to the stakeholder."

(Mitchell 1997, 867)

Mitchell suggests that, in order to be able to affect or be affected by an organization's objectives, it is not necessary for a stakeholder to have all three attributes. There may be circumstances where legitimacy exists, but not power or urgency; similarly there may be circumstances where power or urgency exist, but stakeholders do not possess legitimacy. Mitchell concludes that:

> "stakeholder theory must take account of power and urgency as well as legitimacy, no matter how distasteful or unsettling the results. Managers must know about entities in their environment that hold power and have the intent to impose their will upon the firm. Power and urgency must be attended to if managers are to serve the legal and moral interests of legitimate stakeholders."

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[7] Theories of power are considered in detail in Chapter 8

These comments underline a recognition that, in commercial settings at least, stakeholders with a legitimate right to affect or benefit from an organisation's actions may have this right denied.

### Legitimacy within social policy settings

The literature concerning legitimacy in social policy settings is not extensive but it is growing, as found in a search using the ProQuest core database:

*Fig 12: "Legitimacy" literature search results*

**Search criteria**

- All databases

- Peer reviewed

- Language:  English

- Source:  all

- Document type:  all

| Abstract containing | 1999 - 2008 | 2009 - 2014 |
|---|---|---|
| Collaboration + Legitimacy + Community | 15 | 17 |
| Co-production + Legitimacy + Community | 0 | 1 |
| Partnership + Legitimacy + Community | 39 | 30 |
| Collaboration + Legitimacy + Society | 5 | 12 |
| Co-production + Legitimacy + Society | 0 | 0 |
| Partnership + Legitimacy + Society | 15 | 11 |

*2014 ProQuest LLC search 24 March 2014*

However, much of the literature starts with an assumption that the individuals who are being engaged with a partnership, or who are the focus of efforts to empower them to become engaged, are the legitimate representatives of others.  Following

Suchman's definition of legitimacy, there is a generalized assumption that the actions of these individuals are desirable, proper and appropriate. This chapter considers the basis for this assumption.

The research identified four reasons for supporting or justifying a person's claim to have a legitimate right to speak or act for others:

- being active in the local community

- sharing experience with the people being represented

- being appointed or elected by the people being represented

- having the skills necessary to be carry out the role well

Added to these were two further reasons. They both arose from legitimacy being conferred by those in positions of power rather than claimed by those wishing to represent others or conferred by those wishing to be represented. One was legitimacy arising from being invited to be a representative, by being invited to join a collaborative group by people in positions of power who were already known to them. The second was legitimacy arising from support, recognition or appointment as a legitimate representative by people in positions of power.

This chapter identifies many contradictions in people's perceptions of legitimacy, with claims of legitimacy for some people or in some circumstances which are challenged when they are made by other people, or in other but similar circumstances. Contradictions arise due to some people accepting support, recognition or appointment for themselves but challenging it being given to others. Also, amid the many claims and counter-claims to be the legitimate representative of other people, the research found examples of people being appointed as a legitimate representative when they did not wish to be so and of those in a position to represent minority groups deciding not to do so. This leads to questions of why those in positions of power decide to confer legitimacy on some, but do not recognise the claims of others.

**Findings:  I can speak for others because …..**


*I'm active in my local community*


Legitimacy arising from being part of the community one seeks to represent, or from having strong links with it, was a common reason for people believing that they had a right to speak or act for others, and to be listened to.  This was observed by Janet:

> *I can't think of one who's not involved in community issues as well, which is good!*

And by Lucia:

> *And that's because we spent talking to the public and it's plain what we doing. We're asking people what they want, change, and that's what we do, sending to the government.  That's what made, really, the forum.*

This form of legitimacy was endorsed as well as claimed.  For example, Bronwen praised one local Councillor because he was often seen about the local area and so was easy to approach and people knew what his interests were and what he was doing, but she criticised another because he was not visible in the local community and so she didn't know what he did.

Simply living in the area or having contact with other older people was not seen as giving an automatic right to speak for them.  When interviewed, Hillary expressed an appreciation for the contribution that members bring through their links with other older people, but stated that they still expected to be challenged:

> *You wouldn't put anyone on our executive who didn't know anyone else over 50 … in their lives, in their family lives, their social lives.  And if they have an opinion, the other members will challenge them on that, and you've seen that.*

In order to have a legitimate right to speak for older people, someone needed more than personal links with other older people or to be active in the local community, but these did appear to be a basic requirement.  This source of legitimacy did not feature in the literature and knowledge review, and this might be because it appears

obvious; after all in this case, someone would not join a local 50+ forum unless they were over 50 and lived in the area.  But local areas can be difficult to define; this 50+ forum covered an area made up of many different rural and urban communities. Being "older" is also difficult to define; the most common reason for an Executive member having regular contact with an older person aged between 50 and 60 appeared to be because the person was a son or daughter.  Consequently, although this may appear a basic requirement which is too obvious to even mention, it is also a requirement which may not have been met.

### I know what it's like to be an older person … unlike some people I could mention

Respondents spoke more forcibly of feeling that legitimacy arose from having shared experiences.   For example, Lucia spoke of her empathy with people who felt frightened or intimidated by the behaviour and language used in some formal settings, believing that having shared this experience gave her a right to speak on their behalf:

> *I suppose I can understand because when I first came here I didn't speak the language at all, and that was intimidating to me, because if people didn't …. It's like when they say, the body language, sometime.  At the time, to me, that was important.  I could see if a person was overpowering me or …. I was intimidated.  So I can understand those people.  If you've had those experiences yourself, then you more likely to understand other people, I think.*

Elaine believed that she was able to represent older people because of her experience as an older person:

> *Elaine:  When you work in a certain job on a specific subject, you tend to get a bit tunnel vision as far as that topic is concerned, ….*

> *continues*

> *Llinos: The forum, made up of ordinary people?*

> *Elaine: Indeed, we're ordinary people. And the older you get, the more relatives you've got, and the more relatives you've got, and more stuff happens (laughter)*

Elaine, along with others, strengthened her claim by challenging the right of those without such experience, notably paid professionals, to make decisions for others. Deborah and Sharon gave many examples of working with statutory bodies, where their personal experience and knowledge of older people's situations were at odds with the judgments of people in paid/professional positions:

> *Sharon: People in jobs ….. 90% don't know anything about it. They sit with their mouths open like this (gestures) …..it's mind blowing"*

Continues

> *Deborah: We tried to do something about transport and there's the people in Transport, because they have their own cars didn't realise how frustrating it was that the transport situation sort of thing. And we said "have you ever been on a bus? Have you tried it?"*

*continues*

> *Sharon: I mean, the council seem to have absolutely no idea*

The 50+ Forum's membership was entirely female and some members felt that this reduced their legitimacy to represent men. As Elaine said:

> *like it or not, men do see things differently*

During our interview, John spoke of being approached directly to take part in a Welsh Government consultation on male sexual health:

> *I was asked to do it. Because they wanted men who …. No one was responding, so I just received it personally and I did it. And then I had the bloody micky taken out of me over , "if you want any information on that, just see John" (laugh) Oh yeah, nice one!*

The 50+ Forum would have been aware of the consultation, and even though many members were married, had been married, had sons or had friends who were men,

they still chose not to respond.   John's experience is illustrative of the weakness inherent in an over-reliance on established networks,  particularly so in cases such as this, when shared experience is vital if the contribution is to be of value.

However, the 50+ Forum did include two strong, articulate members who could fall into what Blakely refers to as "minorities within minorities"; Lucia and Jennifer.  In our interview, Lucia spoke of having empathy because of her experience of coming to the UK immediately after the Second World War and not speaking English, and of helping older Italians who were having to deal with the Consulate for the first time as a result of becoming widows.  Jennifer spoke in passing about being accompanied by Alice as she was no longer allowed to have a guide dog because of her age, and both spoke of being involved in a local Disability Access group and the national Guide Dogs charity.  Lucia's support for older Italians was linked firmly with her local, "below the radar" Italian/Catholic church community.  Although Lucia had been involved in many large voluntary organizations, none of these were associated with BME issues and she was not a member of the Black and Minority Ethnic Elders network, which had membership of the NPF. Although Jennifer had been invited to be a member of the local Disability Access Group, neither she nor Alice felt that the group had achieved much:

> *Alice: We go to these planning meetings, the architects.  They're very good, and they take down these notes, about what we say, but whether anything comes of it, we just don't know.  Because we don't get feedback.*

> *Jennifer:  We don't get feedback.  Whether there's some sort of doing what they want to do*

> *Alice:  Because the book says so*

> *Jennifer:   Because the book says so, because it says you've got to have some disabled people looking at these plans with you.*

> *Alice:  I don't know.  Whether anything comes of it, I really don't know.*

Their experience reflects the damaging, tokenistic consultations described by Pearce and Milne.  Alice and Jennifer spoke with far more enthusiasm of their work

fundraising for guide dogs, where they believed their efforts had made a real difference.

Neither Lucia nor Jennifer put forward a view of "older person AND blind / older person AND not British" during Forum meetings.  Although Lucia and Jennifer believed that they had a right to speak for older people because they were older people themselves, they did not choose to identify themselves as a spokesperson for older people who are blind or not British within the setting of the 50+ forum.

### *I've been appointed by other older people*

Many of those not involved with the 50+ Forum or AWF commented that democratically elected decision makers and their appointed officers were not equipped with suitable experience to make decisions on behalf of older people.  As one lady in the walking group said:

> *Do you know how much extra you get when you reach 80 in this county? 25p, 25p! And it's been like that for years!   Do those people in government have any idea how much 25p is, or what you can buy for it?"*

However many still expressed a belief that, in order to have a legitimate right to speak for others, it was necessary to have formal links with the people one claimed to represent. At the observed AWF Wales meeting, Kenneth, a founder member who did not represent a 50+ forum, spoke of AWF's legitimacy to speak on behalf of older people. He based this on its being made up partly of representatives of 50+ forums and other organizations of older people in Wales:

> *We do represent hundreds, thousands of people in Wales …… we get all the information we can from the group we represent ….*

The 50+ Forum's membership had fallen dramatically following the introduction of a subscription. Some felt that the drop in numbers resulted in the organisation having less legitimacy to speak for older people, or to be listened to.  Lucia disagreed with the original decision to introduce a subscription, believing that it prevented those on low incomes from joining.  She also believed that, as a result of the falling membership, the Forum was unlikely to get future support from the Welsh

Government:

*OK, £5 not much, nothing for us maybe.  But for an elderly person, like the
one I was telling, it's a lot.  So membership declined, only the 120 people
reply.  There was people who reply, but then we didn't get the final reply, so
ended up less and less.  But you going to the Welsh Government with 136
member, you not going to get the funding.  We used to get the funding
because we had nearly 1000 member.*

However it was also suggested that the introduction of the subscription strengthened
the legitimacy of the organisation as it now had an identified membership of people
who had made a considered decision to join, for example:

*Hillary:  Well, they had people who had only attended a meeting, not people
who had said we want to be members of the forum and do what's reasonable
….. none of that was there.  And because, and I think it was a good thing that
we were short of money and we did have to review our membership.  People
now, they have to give something don't they …. In comparison to what the
forum was before, it's a lot*

*Llinos:  equivalent to 3 loaves of bread?*

*Hillary:  Yes, but 3 loaves of bread is essential, membership of the forum is
not.*

Alice and Jennifer also expressed doubts that the 50+ Forum's apparent high
membership legitimised its claim to know and be able to speak for older people of
the area:

*Alice:  As I say, the thing, we had 2 or 3 meetings, but people obviously
weren't interested.  The first meeting we had we had in the downstairs room in
the CVSC and there were probably 8-10 there, and then we tried another and
the numbers went down and so we said there was absolutely no point in doing
it.  Having said that, we wondered whether it was because the people who
were apparently members of the forum  were not really involved in what was*

*going on. I'm not being critical now, but I don't think there was enough involvement with the people who were not on the exec committee or associate members …*

*Jennifer: the ordinary members*

*Alice: because you'll be aware …. That when they try to get people to say that they are members. Supposedly we have 900 members, but now you've got to pay £5, and let's be honest, £5 these days is peanuts isn't it …. There were only, they've got 100 something back, and I don't think that the people who are supposedly members have been involved enough.*

Whilst some who had been involved with the 50+ Forum for many years, notably Deborah and Lucia, believed that members had been fully involved and committed, most felt that the Forum had not had a strong, identifiable membership. Even the development officer, Mark, felt this:

*And you've got to say, that when we got to 1000 members or whatever it is, the majority of them was sleepers. They'd sign up, get the magazine, you probably wouldn't see them again, you know, but …. We had questionnaires, some of them would …. But they weren't the core. The core was the committee.*

The claim of legitimacy based on being appointed by older people has contradictions similar to those arising from claims of being active in the local community. It would have been very easy to establish that the 50+ Forum was not the nominated representative of older people in the area, their membership was far too small. Even their claim to be the nominated representative of their membership was open to challenge. After the introduction of a subscription, fewer than 20 of the 100 members attended the AGM and membership of the Executive was transferred from the previous year without having a vote (one member later complained that she had consequently automatically been elected to the Executive when she had sent a letter to the AGM stating that she no longer wished to be so). The decision to introduce a subscription had been made by the Executive, not by ordinary members, and it was not known whether people had decided to pay for membership and join because they wanted the Executive to represent them in the decision-making process, or whether it was for some other reason – such as receiving a regular newsletter with

interesting information. An even greater contradiction was Kenneth's claim that AWF was a chosen representative of older people, particularly as he was a founder member and was not a member of a local 50+ forum or any other group of older people himself. Membership was not based on people being nominated by groups which were nominated by older people – the majority of older people probably didn't even know of AWF's existence.

The literature and knowledge reviews did not identify election or nomination by an identifiable constituency as a source of legitimacy, but this raises questions of why it is not thought necessary for a legitimate representative to be nominated. It also raises questions of whether it is being assumed that people who claim legitimacy are able to identify their constituents when they cannot. People claiming legitimacy to represent others on the basis that they had been appointed to do so, and the acceptance of this claim by those in positions of power, suggests a reticence to let go of a source of legitimacy that is integral to the established democratic process. However, the claim and acceptance that this is what is happening, when it evidently is not, suggests a need to bolster the claims of legitimacy of those who are already representing others. It also suggests a lack of confidence and honesty by some with regard to why they believe they have a right to speak for others, and why some people in authority are choosing to listen to them.

### *I've got the skills and experience to do a good job … and nobody frightens me*

Reference has been made to the fact that the Welsh Government had not stated that engagement with older people had to be through formal committee structures. However, this is the structure that had been adopted in this area through the 50+ Forum, and also on an All Wales basis through AWF and the NPF. Furthermore, of those interviewed and observed, the possession of skills and experience necessary to perform well in these environments was seen to give legitimacy to their assumed role as the representative of others.

When discussing a proposed visit to a residential centre, the members of the 50+ Forum shared a belief that they needed to present a professional image. Jennifer

spoke of their needing to present themselves as an "articulate, serious group", whilst Alice added that they needed to show the Housing Association that they were on a fact finding visit and were not just interested in "tea and biscuits".

Janet, who was an elected County Council Member and had 50 years experience within the voluntary sector, also spoke positively of Forum executive members being "almost professional committee people".   Hillary expressed a very strong belief that it was necessary to have the required skills and experience in order to claim legitimacy to represent others:

> *I mean I'm a volunteer but I have lots of professional experience as well …*
>
> *Continues*
>
> *I mean, you can't pluck someone of 50 off the street and say "become involved" because they have no idea of what they are committing themselves to do, to read, to come to meetings, to think about things.  And that's not a common characteristic of people.*

Being chair of the 50+ Forum placed Hillary in a position where she was often approached as spokesperson for the group.  However Hillary felt that her legitimacy to be chair of the Forum lay in her skill at drawing out the views of others, rather than her presenting her own views:

> *The trick of being the chair, you'll see I go to people and say, what do you think, what do you think …. Drawing people out and then in the end they don't need to be drawn out, they'll say it on their own.*
>
> *I've not been chair of a national voluntary organisation for nothing.*

When proposing that she contact the Welsh Government to question John's position on AWF and to secure a place for the Forum, Hillary took steps to ensure that she was acting on behalf of the 50+ Forum.   When the subject was first discussed by the Forum, Hillary introduced it with great deliberation:

> *Let's go through this slowly …… John and Kenneth are members of AWF as founder members. ….. The only way through is to write to the Assembly, point*

*out that the forum is not represented and ask for their advice on how to*
*proceed*

At this and subsequent meetings, when making decisions on writing or otherwise contacting the Welsh Government about this matter, Hillary deliberately sought approval from members before making a decision.  This was the only matter discussed by the 50+ Forum where Hillary asked for a vote by members, and put the question to members, one by one, before announcing the decision.  Of course it could be argued that asking such a direct question of a named individual, in front of the rest of the group, was not an example of "drawing people out", but of terrifying them into submission.  Nonetheless, it is a skill that those choosing a representative may value.

Skills and experience in assessing other players and judging whether to challenge them or build alliances appeared to be as important for establishing a legitimate right to speak for others as having general committee skills.  It is possibly surprising, given how candid Hillary was at Forum meetings and during her interview, that she was the only Forum member who spoke of needing diplomacy and negotiating skills when representing others:

> *There's no use being sharp with your partners, they'll just pick up their sticks*
> *and go.*

> *You have a choice and you build up that relationship so you can sit at a table,*
> *argue with your partners, but not lose respect.  So they can ….. you have to,*
> *how do I say, you have to articulate it, knowing the scene that your other*
> *partners work at.  I mean, if you were to say to the local health board "well*
> *we'll take a bit of money that you're using for cancer prevention", you'd never*
> *have a hope in hell, would you.  So you have to think ….*

Alice and Jennifer felt that the current appointment of Hillary brought opportunities for improvement because of Hillary's skill and experience:

> *Alice:  I think if the forum continues ….. I do hope that Hillary can continue for*
> *another 12 months certainly, because she knows a lot of people , she's got a*

*lot of experience with this sort of thing, with the voluntary side of things. I think perhaps the forum could become, noted.*

*Jennifer: At the moment it's in a position to surge forward, hopefully.*

Similarly, Emma spoke of Hillary having a legitimate right to speak for the Forum and for older people in general, because of her skill and experience:

*Like Hillary is quite elderly, but Hillary's got vast experience, so you can't , you know that she's not going to be silly or let you down or anything.*

John's description of the formation of AWF suggests that he was with a group of people who did not just have a good understanding of formal committee protocol. They were very skilled at working in such environments, making judgements of when to challenge and when to form alliances:

*I go to these meetings (group name deleted to protect identity)) and I discovered the chairman had refused to have an AGM, and he'd been chairman for years. And I thought, this chap can't……. So eventually this woman, she eventually voiced her opinion at one of the meetings and, so I said I would , and yes …. So the Chair, and all of a sudden, 'cause he'd been on television a couple of times and he'd been meeting the Ministers, because (group name) was quite a powerful group. Anyway, after that we decided that we couldn't carry on because (unclear tape) So after that we thought we needed something so, we'll , what will we call the group, (group name) 2 for now, that will do. Then all of a sudden it wasn't just the 4 or 6 or 8 of us, Caerphilly, Rhondda Cynon Taff, Torfaen, they were all joining in. They wanted, they didn't want , they'd been involved with (the organisation) in the past, but they'd had a row with the chair and they went off. So they wanted something to hang their hat on. So we became …. But we had to decide on a name now. So we were going to call ourselves (group name) , if you like, because we all liked the name (group name), and …. Anyway, the Chair jumped up, and threatened us with all sorts of legal things if we, and so on, so*

*continues*

*So anyway, we eventually called it AWF, All Wales Forum for Older People.*

John, and the other founding members of AWF, displayed confidence in challenging those in established positions of power, and skills in networking and forming alliances outside of their other skills associated with operating within a formal committee setting.

Although holding specific skills was equated with holding legitimacy, sometimes it appeared that it arose from a belief that those in power were not willing to share their power, and so a degree of skill was required to wrench some of this power from them.  Someone without these skills could not legitimately represent other older people because they would not be able to make the required achievements and so their assumed position as a representative was false as well as futile.  This view was reflected in a Forum meeting when Hillary reported that the Council had asked for a Forum member to review a Commissioning Strategy document and said that they needed to propose "a **critical** reader", with Sharon adding that they needed someone who would "know how to read between the lines".

Hillary expressed this view in greater detail when interviewed, when she seemed to suggest that legitimacy to represent other older people came from skill and experience, combined with a lack of fear, rather than from their being nominated by other older people:

> *None of the exec members represent others, not formally.  They come with experience within themselves, I could name you a couple.  Not many are not involved with some other organisation …… Emma various things in the CVSC, couple in CHC,  but not representing, but bringing what they learn in their own person to the table. … Meetings with council  … They're not going to be frightened.  When they go to AWF, they're not going to be frightened.*

Hillary was not alone in this view that legitimate representatives needed to be assertive and willing to challenge those in power.  Bronwen spoke of her recently found confidence to "say what I think", whilst Lucia spoke of her belief that those in positions of power will try to intimidate:

> *But there's the social, different, in some sector.  But I can be at the same level (laugh).  But I can be at the same level too.  They don't intimidate me.  I grew up …. My father was involved in politics, so I'm used to (laugh)*

This view of collaborative working and co-production is at odds with the view commonly presented in policy statements.  It is difficult to equate the Minister Statement in the forward of the third phase of the Strategy for Older People that "the varied contributions older people make, both economically and socially, are valuable" (Welsh Government 2013, iii), with Hillary's comments about "not being frightened" and Lucia's comments about intimidation.  This research has not sought to find out whether policy makers, such as in the Welsh Government or Council, have set out to scare or intimidate older people who wish to be involved in the decisions which affect their daily lives.  Neither has it sought to find out whether policy makers are aware that some people have been scared or intimidated in the past, or are concerned that they may be in the future.  What is of interest to this research is that two people who have amassed decades of experience running businesses, leading national voluntary organizations, holding managerial positions in multi-national companies and participating in national government advisory groups believe that an older person attending a meeting with a stated purpose of being collaborative needs to be prepared for attempts to scare or intimidate them.  These comments have not been made by people who have little experience and so may be easily scared or intimidated.  Their past experience gives them a basis against which to judge the behaviour they have observed when older people have tried to be involved in collaborative decision-making.

### Well I was on that group, so they asked me to join this group

There were a number of examples of people being seen to have a legitimate right to represent others mainly, or even solely, because they were or had been a member of another group which also claimed to represent others.

As founder members of the 50+ Forum, Sharon and Deborah had been heavily involved in the Older People Programme Group.  This was an inter-agency forum for planning services for older people which was administered by the Council but which they believed to have been established on the direction of the Welsh Government (this inter-agency forum was known as the Programme Group).   Through their involvement, Sharon and Deborah had been involved in making decisions at a high level:

*We went to unified assessments, we were involved in making decisions.  I was in on interviews for posts.  We used to receive information before it was issued so that we could say what we thought, whether it would make sense to Jo Public*

As a result of being the Chair of the 50+ Forum, John had attended meetings of (group name) and then become a founder member of AWF.  Mark, the former Forum Development Officer, described this in the following terms:

*He left.  But not before he'd got a toe in the door regionally and nationally,*

This perceived injustice of John's continued membership of AWF when he was no longer a member of the 50+ Forum was discussed at length at Forum meetings.  However, John was emphatic that he had never claimed to represent the older people of the area:

*So, this is what I was trying to explain to them at the Forum, but all Hillary kept saying was "who do you bloody represent", you see.  And I said, I don't represent, I represent AWF.  "So what you're doing, you're not with the forum now, what are you doing on all these committees".  And I said, well, I'm a founder member of AWF …*

The Welsh Government Induction Pack for NPF members states that current members include "regional representatives from 50+ Fora".  These are 4 members of AWF, but they are not nominated by 50+ Forums, or even by AWF members; they are selected by the Welsh Government.  John described his selection:

*I was invited to join.  I didn't know anything about it.  Having said that, if you live in South Wales, but I didn't know anything.  But I kept hearing about these meetings, people constantly saying "I'd love to get onto the National Partnership", and I used to think, it's probably like the pensioners forum thing, you know, NPF, the national pensioners forum, the national partnership didn't mean anything to me.  And I used to say, what is this, and they'd say "oh, it's all about …. Good things", and they didn't know themselves what it was about, and next thing I know, I got invited to join.  And I, I'm rather keen, but before I did they said before you do, I had got to be interviewed.  And that was*

*in Llandudno, they interviewed 4 or 5 of us, which only 2 of us were accepted, 3 of us were accepted.  To hear what your views were and how you'd put yourself forward*

John went on to say that the interviews were carried out by the NPF Chair and a senior Civil Servant. John's initial membership of the 50+ Forum had led to him having membership of AWF and then membership of the NPF.  His legitimacy to speak for older people arose from his membership of other groups and from people in positions of power appointing him as a representative.

This pattern of people being invited to join groups as a result of being members of other groups appeared common across all areas of voluntary activity:  for example members of the village walking group spoke of joining fundraising or event planning groups for one organisation because they were known as members of another organisation.  However there is a difference between a group which is aiming to raise funds or organise an event, and a group which is developing policy or making decisions on public services.  Almost all members of the 50+ Forum spoke of being invited to join groups as a result of being a member of another group, including policy and service planning associated with health, education and employment. John, Deborah and Sharon shared and voiced their concern for the wellbeing of older people and about age discrimination and injustice.  At one point, all three were welcomed by decision makers as legitimate representatives of other older people even though they had not been nominated by other older people to do so.   Their concerns, and the way that they described them, did not change but by the end of the data collection period Deborah and Sharon were no longer being invited as legitimate representatives of older people.  John was still welcomed as a representative by the Welsh Government, despite his legitimacy being questioned by his area 50+ Forum, and others.  The possible reasons for these changes will be considered in the later chapters, but the changes of themselves highlight the fragility of this form of legitimacy.  Nonetheless, simply "being asked to join" remains the most common form of legitimacy.

***Powerful people have decided I'm good to have around***

Although some individuals were placed in a position where they could claim to have a legitimate right to speak for others because of their own skills or membership of established groups, their legitimacy was often supported or enhanced though the political or financial support of others. The Council had used Welsh Government Strategy funding to support the development of the 50+ Forum, it had not developed out of the independent actions of a group of older people. Although the level of funding from the Welsh Government to local authorities had decreased across Wales, it was the Council's decision to deal with this by removing funding for the Forum; some local authorities continued to fund 50+ forums and made cuts in other areas. It was the reduction of this funding which prompted the decision to introduce a subscription, which was generally accepted as the cause for the drop in membership and which some believed resulted in a loss of legitimacy. Even those who believed that a subscription strengthened legitimacy spoke of the Forum having difficulty functioning, and its future being at risk, because of the lack of administrative support which Council funding had provided. The Welsh Government supported AWF financially and administratively, providing funding for travel expenses and room hire, as well as funding for administrative support through a national voluntary organisation. The Welsh Government also provided professionally facilitated training and development. The immediate costs incurred by individuals attending AWF meetings, such as travel costs and time, were significant and so it is unlikely that this group of people would have ever met if they had had to meet them themselves, regardless of their commitment.

However, support for the legitimacy of a group was not only apparent through funding. During the data collection period, the 50+ Forum was approached by a Housing Association to visit and comment on a new residential development for older people. None of the members of the 50+ Forum lived there, and everyone who expressed an opinion said that they would not wish to live there. However they felt that it was a suitable place for many other people, including friends and acquaintances they knew who had moved there, and this was reported to the Housing Association. This was also reported in the Forum's annual report, as

evidence of work it had undertaken on behalf of older people. The Forum's legitimate right to speak or act for older people was supported by their being asked by a housing association to take on this role. The 50+ Forum was also approached to comment on a draft Social Services Commissioning Strategy. This would have been noted as evidence of consultation with older people when the document was later published, giving further legitimacy to the Forum's claim to represent older people. During the data collection period, the Council approached the 50+ Forum with a request that Forum members interview older people receiving home care services as part of their wider evaluation process. The proposal was made in a very vague way: Hillary reported to a Forum executive meeting that she had been phoned by:

> Lisa "somebody" at the Council. They want us to do a little job ….. go to see people over 50 that they (the Council) would choose ….. They have a bag of money they want to get rid of

The proposal generated much debate at meetings, and comment during individual interviews. Whilst some felt that the proposal showed that the Council recognised the 50+ Forum as an organisation with strong links to older people in the area, others were concerned that they were being manipulated and would not be given the opportunity to represent people's real concerns to the Council. The Council proposed to train Forum members to carry out the interviews, but it was not clear whether the questions would be set by the Council or whether Forum members could decide their own line of enquiry. Deborah made a comment that was echoed by others:

> I want to know if it's meaningful. A lot of these tick box exercises are a waste of bloody time

However, the Council seemed determined to proceed with their proposal and to use the 50+ Forum as a conduit for gaining the views of older people in receipt of services. The proposed payment of £5,000 was made to the Forum before any agreement had been signed, or even drafted and before there had been any meeting between the Council and the Forum to discuss the proposal in detail. The cheque was issued to the Forum at the end of March, but the contract documentation did not

start to be prepared until May, and the proposed training programme for Forum participants did not arrive until July. In essence, the 50+ Forum had received the funding from the Council before it had agreed to undertake the task, and even before it had been informed of the task it was being required to undertake. Over a period of 5 months, the Forum debated whether or not it should take on the required task, and Alice voiced concerns at meetings and during our interview that the Forum had received the funding but was not "getting on with it" and so would have to repay the money. Her concerns were dismissed by Hillary at a Forum meeting, who retorted:

> They **won't** want it (ie the funding) back

The 50+ Forum appeared to have been appointed as the legitimate representative of older people, at least in this instance, whether it chose to be or not[8]. Similarly, AWF's main claim to legitimacy seemed to be based on the legitimacy that it was awarded by the Welsh Government. This includes both the legitimacy conferred on the organisation, and legitimacy conferred on individual members. John spoke of AWF developing out of (group name), partly as a result of encouragement and funding from the Welsh Government, and spoke in detail of the influence that the Welsh Government had on the setting up of AWF, specifically through "holding the purse strings". John was appreciative of their support and advice on constitutional matters, pointing out that they had agreed a constitution in a relatively short period. However, some of the constitutional arrangements appear unusual. For example, John's comment:

> Oh, by the way, the other thing about AWF is, we're not a Committee. We're not a committee, we're a group of people. The reason for that is, I was appointed Regional Chair for 4 years. Having a committee means you can be voted off. I can't be. At the end of 4 years they'll appoint somebody else.

The legitimacy of John's membership of AWF had been challenged by the 50+ Forum and by the Council. In his interview, the former Development Officer spoke

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[8] During the 2013 AGM, after the period of data collection, the Vice Chair reported that very few interviews had taken place. However, the Council requested that the Forum sent representatives to a planned meeting with the Older People's Commissioner as the Council had reported the project as an example of good practice and the Commissioner wished to find out more about it.

of both he and the Council Senior Manager responsible for the Strategy making direct representations to the Welsh Government:

> *Yeah, one of the issues was that John, who was by then the ex-chair, was attending these meetings "thank you very much, all paid for".  But not representing the forum, and in fact, not supporting the forum in any way.  I know that because I had many meetings with (Welsh Government Civil Servant) and told him what was going on.  And he chose not to do anything about it.  So the Welsh Assembly Government, certainly he, knew that John was not representing the forum anyhow, in fact he'd almost been thrown out.  But he chose not to listen.  And that came from the Council Senior Manager, she had similar words with him about this.*

John was aware that his membership had been challenged, and made a reference to AWF changing its constitution as a result:

> *and I mentioned it to Cardiff and they immediately changed the constitution, and they made me and Kenneth, as founder members, permanent members of the committee.*

I do not have a copy of the original constitution, but the current constitution (Appendix 7), which notes John and Kenneth's membership entitlement, is dated 30 May 2012.  This was shortly after the reported heated meeting between John, Kenneth and 50+ Forum representatives and during the period when Hillary was making contact with the Welsh Government to secure representation for the Forum on AWF.  Chapter 3 describes the many ways that older people and their organizations can communicate with Welsh Government ministers and influence policy development.  However, John's description of the workings of AWF and the NPF suggests that the legitimacy of AWF and its individual members to represent other older people is almost entirely due to the Welsh Government's decision to recognise and support them.  This research deliberately did not gather data from Welsh Government officials on their role advising and supporting AWF or individual members.  Their view on the response to the former Development Officer's challenge to John's legitimacy may have been different from that of the Development Officer (who is himself a member of the 50+ Forum).  They may have felt that

members of AWF were completely free to decide not to seek and not to follow their advice on constitutional matters.  However, John's description of the Welsh Government officials influencing AWF through "holding the purse strings" suggests that he believed that AWF had little choice but to follow their advice, even though he welcomed and appreciated it.  John doesn't clarify whom he means when he says that he "mentioned it to Cardiff", but given his other descriptions of AWF's workings, it seems unlikely that the "they" who "immediately changed the constitution", did not include Welsh Government officials.  It seems more likely that "they" were the Welsh Government officials, possibly (but not necessarily) with support from members of AWF.

Together with descriptions of legitimacy being based on invitations arising from already being a member of another group, this form of legitimacy arising predominantly from the decisions of those in positions of power  suggests that very little progress has been made to empower older people.  Undoubtedly mechanisms and structures have been established to allow older people to be involved in the decisions which affect their daily lives.  However, whilst individual older people may choose not to engage with these mechanisms and structures, they do not have the same freedom to choose to engage.  This choice is made by others.


**<u>Conclusions</u>**


This research has found examples of claims of legitimacy based on a mixture of all six reasons:  being active in the local community, sharing experience, being appointed by other older people, having the required skills, and of being invited or supported by those in power.  However, the claims brought with them contradictions, with individuals accepting a claim in some circumstances and challenging them in others.  These contradicting views could be extreme, sometimes amounting to an unquestioning acceptance of glaring inequality.

### Contradictions of the invisible, and possibly non-existent, constituency

The Strategy for Older People in Wales did not set out to replicate a system of democratic representation, comparable with that of government. In some parts of Wales, investment has been made in developing alternative methods for capturing the views and giving a voice to older people.  However, both financial and emotional resources have been directed predominantly towards establishing traditional, elected committee structures and hierarchies.  Furthermore, both individuals and groups indicated a belief that having an identifiable constituency enhances legitimacy.  The acrimonious claims and counter-claims of the 50+ Forum and AWF to be the chosen representative of older people suggests an underlying belief that being the chosen representative gives legitimacy to speak and a corresponding right to be listened to.  Finally, AWF's constitutional requirement to have 2 representatives from each Local Authority area, one being from a 50+ forum, suggests that the older people involved in establishing the group, and possibly their Welsh Government advisors, believed that being able to claim to have been selected or nominated by other older people gave legitimacy.  This concurs with Tsasis' finding that being able to mobilise a constituency increases political strength and influence within a partnership (2008, 19-22).  However, the actual ability for a Forum or AWF representative to mobilize anyone is untested and so their legitimacy remains open to question.   This contradiction between the claimed basis for legitimacy and reality was so great, it is difficult to understand why this claim was so common both by older people claiming legitimacy and by powerful organizations recognising or bestowing legitimacy.

### Contradictions of the assertive, the aggressive and the frightened

John was the only person to make a reference to what Loffler and Bovaird (2010, 19) call "more assertive users"  who "tend to benefit most from their relationship with the state".  All the other people who were interviewed and observed believed that personal skills and experience added to their legitimacy to speak for others, and that a greater level of personal skill gave greater legitimacy.  For example, a number of Forum members described their admiration for Hillary's skills and experience and felt

that she was the most suitable person to lead and speak for the 50+ Forum – and therefore older people in the area.  Similarly, although when interviewed, Sharon spoke of not needing degrees or education to represent older people, just common sense; when the Forum was asked to review a draft strategy document for the Council she said that they needed someone who could "read between the lines". There was repeated criticism of John, with angry expressions that he had no right to represent the older people of the area at AWF.  However, none of this criticism was due to a perceived lack of skill, or a fear that he wouldn't do the job well.  The criticism arose from a belief that he was claiming to represent others when he had not been given a mandate to do so.  In response, John defended his position by emphasising that he had never claimed to represent anyone, and that he was a legitimate member of AWF because of his skills and experience.   This requirement for a level of skills such as committee working, building alliances and negotiation contrast with policy statements about wanting to engage with people who do not have such skills.  The reasons why older people believe that these skills are necessary to give legitimacy suggest a lack of trust in the process and raise questions about the motives of policy makers for seeking engagement with those who are not skilled.

Many interviews reflected on the imbalance of power when lay older people are involved in collaborations with large voluntary and statutory organizations.  These included overwhelming demands on time and travel, use of jargon, unexplained cancellation of meetings and a lack of understanding of personal circumstances that verged on plain rudeness.  People who had had long careers in senior positions used words such as "intimidate" and "scared" when describing meetings with partner agencies.  Possibly this study's finding that lay people associate legitimacy with skills and experience arises from the group's collective experience of partnership working and a realisation that such skills are an essential character of any successful representative.  Questions of power relationships will be considered in a later chapter, but these findings, combined with those of the Motivation chapter, challenge Loffler and Bovaird's claim of assertive users benefiting most from their relationship with the state.  In contrast, these findings suggest that if only less assertive older people became involved, the state would benefit and older people generally would suffer.

### *Contradictions of the silent voice*

Although being active in the local community was viewed by many as a basis for legitimacy, neither AWF nor the 50+ Forum was active throughout the geographical area covered and so was not active in all the communities they claimed to represent. Claims of legitimacy based on being active in the community also contradicted statements made when discussing why people may be motivated to become involved in voluntary action.  Some had reflected on opportunities being linked to social position and affluence, indicated little link between motivation and place and occasionally showed little empathy for long-established communities (such as Welsh speakers).  All these sources of motivation suggest a lack of engagement with parts of the community and so contradict any claim of legitimacy arising from it.

It was not a view shared by everyone, but the belief that legitimacy arose from having shared experience was the most important factor in some people's confidence in their right to speak for others.  At times, this sense of legitimacy appeared to lead on to a sense of duty, as in the case of Deborah and Sharon when they described paid professionals making decisions which were damaging for older people because they had no shared experiences and so did not foresee the consequences of their decisions.   Their anger, frustration and distress at no longer having a voice at partnership meetings (due to the  Programme meetings no longer being held and the 50+ forum not being represented on AWF), arose more from their belief that other older people would suffer as a result of this, than from a sense of personal rejection. This very much reflected the findings of Phillimore et al (2010, 23), that they were a vital resource, basing their actions upon their own distinctive local and specific knowledge which resulted from their lived experience.  However, regardless of their sense of legitimacy or even their sense of duty, these individuals did not have specific knowledge or lived experience of what Blakely refers to as the "minorities within minorities" (2006,15). Those who may have been able to claim to be a minority within a minority, such as Lucia who was Italian, Jennifer who was blind, or John who was male, appeared reluctant to claim to speak on behalf of these groups, and only did so when asked.  Lucia limited her involvement with the Italian community to "below the radar" settings even though she enjoyed being involved in

large voluntary organizations concerned with other matters.  Jennifer became involved in a Disability Access Group because she was asked, but felt that the group was tokenistic. Whilst John laughed about having "the bloody micky taken out of" him, the reluctance of all three people suggests that the structures developed to give a voice to lay older people may actually silence some older people even further, doing little to support them to speak up.


### Contradictions of the sought after gift, the unwanted gift, and the gift taken back

This research gives many examples of Jeffares' findings of public sector managers using their networks as a useful tool for getting things done (2010).  The Welsh Government's support for AWF arose from a need to engage with older people on a national scale, and the decision to give AWF support did not appear to take great account of the fact that the members had not all been appointed by other older people.  The Welsh Government then used AWF as a source of regional representatives of 50+ forums on the NPF, even though at least one of the people they invited for interview and appointed was not a representative of a 50+ forum. The Council and a local housing association invited the 50+ Forum to comment on their proposals because they were required to consult with older people.  The 50+ Forum provided a convenient means of meeting this requirement, but the Forum's claim of legitimacy was due to the invitation of the Council and housing association to be a legitimate representative, not due to their being invited or appointment by other older people.

The action of inviting a specific individual or group to represent others is different from a more general aim to empower a particular group or community.  When discussing motivation and opportunities for voluntary activity, a number of people criticised such action and accused those who accepted such invitations, as acting for personal gain.   However, when they were invited to participate themselves, for example Liz joining the CHC or Sharon joining the Programme Group, they accepted, basing their legitimacy for doing so on factors such as shared experience, skill or links with their local community.  Neither Liz nor Sharon appeared to

recognise the contradiction of their claiming legitimacy because they'd "been asked to" join a group, but challenging John's claim of legitimacy based on the same reason. The 50+ Forum felt it unjust that AWF had involvement with collaborations which they did not, yet when the Forum was invited to participate in a collaboration with the Council or housing association, they saw this as recognition of their own legitimacy as a representative of older people. The people who criticised Hillary's position in the 50+ Forum because they believed it was due to the support of the CVSC and Council, supported John's position on AWF even though this was due to the support of the Welsh Government. Similarly, John's most virulent critics were the people who accepted Hillary's legitimacy totally.

The strength of legitimacy based on support from powerful organizations was most evident in the examples of people or groups being appointed as the legitimate representative of others, when their consent to take this responsibility has not been fully secured. Both Jennifer and John had taken on a role as a representative of a minority group (blind people and men) at the request of statutory bodies, but did not appear enthusiastic about the role. The Council decided that the 50+ Forum was the most legitimate source of people to act as a link with users of homecare services, and paid them for taking on this role before the Forum had been given the chance to consider whether they wanted to accept it. But as already described, this legitimacy was also fragile. As Deborah and Sharon's experience showed, this form of legitimacy could be taken away as easily as it was given, and there was no recourse to challenge the decision to do so.


### *Legitimacy – a retrospective attribute*


This research identifies examples of Weber's theory of legitimacy being ascribed to tradition, to affectual attitudes and because it has been recognised as legal. In this example of the Strategy for Older People in Wales, this "belief in legality, the readiness to conform with rules" (1947, 132) has no legislative basis and no policy basis. Nonetheless there are example of the legality of legitimacy being accepted voluntarily and of it being imposed. This research has not included data collected from the Welsh Government, the Council or the CVSC, and so it is not possible to

assess with any certainty why actions were taken. The Council might have cancelled Programme Group meetings or cut funding to the Forum because these were judged as in- effective co-production mechanisms, the CVSC may have insisted on overseeing arrangements at the Forum AGM because it believed that the existing arrangements damaged co-production, and the Welsh Government might have decided that it was more effective to appoint people to the NPF than to rely on the mechanisms of the 50+ forums to elect representatives. However, the legality conferred on the legitimacy of these decisions was not derived from the voluntary agreement of all the parties involved. It was not even, as Weber suggests, "dependent on the willingness of individuals with deviant wishes to give way to the majority" (132). Sharon and Deborah did not willingly give up their involvement with the Programme Group, John did not willingly agree with the co-production mechanisms proposed by the CVSC and Council, and the Forum did not willingly agree to John being the NPF representative. However, none of this opposition was viewed as legal by those in positions of power and so it had no legitimacy.

This research reflects Damme's findings that these increasing number and diversity of mechanisms of consultation and participation have led to the whole policy-making process becoming more complex and less transparent (2010). As Damme found, in this study the different mechanisms are competing with each other, with AWF apparently being viewed as the legitimate voice of older people by the Welsh Government, and the 50+ Forum being viewed as the legitimate voice by the Council. Why the Welsh Government has decided to give legitimacy to AWF whilst the Council has given it to the 50+ Forum will also be considered in Chapter 8. This chapter is able to conclude that lay older people may view legitimacy as something that arises from shared experiences and community links, as well as from holding skills and experience. It can conclude that evidence of nomination by an identified constituency is often used to support claims of legitimacy, though such claims are often weak and may be impossible to prove. However, whilst any of these factors may give people a legitimate right to speak for others, the findings also illustrate that lay older people may remain silent on some issues as they do not believe that they will be listened to; the result of being a minority within a minority, of having experience of discrimination or of not being valued. This appears to be the case even in instances where a person is otherwise very assertive, experienced and

claims to represent a large constituency.  Organizations in power may view any or all of these factors as necessary to give someone a legitimate right to speak for others. However they appear to be used to justify actions taken to "get things done" rather than to identify legitimate representatives at the start of the policy making process.

Contradictions between what is an acceptable source of legitimacy for oneself, but not for others, appear to be linked with judgements of what motivates oneself and what motivates others.  It is easier, and it may be more acceptable, to criticise someone's legitimacy for participating in collaborative action than it is to criticise someone's motivation for participating.  It is easier to say "It's wrong that X is part of a group ….", than it is to say "X wants to be there because of a bad reason". However, perceptions of motivation may not be accurate and may reflect the person perceiving more than they reflect the person being perceived.   Why such glaring inequalities are accepted will be considered further in Chapter 8.  What is clear at this stage is that supporting or buttressing claims of legitimacy by those in positions of power increases the confidence of the claimant.  The contradictions surrounding AWF's claims of legitimacy, ranging from being the representative of "hundreds, thousands" of older people, to John's claim to legitimate membership based on being a founder member, would probably have led to it not existing, possibly never existing, if it had not had the support of the Welsh Government.  The similar contradictions of the 50+ Forum's claim to be the legitimate representative of older people when the Council was developing or evaluating its services, or of Hillary being appointed Chair without a secret ballot, highlight that these things only occurred because they had the support of the Council and CVSC.  Legitimacy is something that is conferred by those in positions of power.  It is not something claimed at the start of a process, but something which is recognised after a goal has been reached.

# Chapter 7 – Networks

## Introduction

Using theories of networks of individuals and/or organizations, this chapter considers how and why people engage or are missed from the mechanisms and structures developed to engage them with the Strategy for Older People.  The chapter goes some way towards resolving earlier questions of why older men are under-represented, identifying a pattern of men concentrating on close family relationships, only moving away from these when necessary.  The chapter also identifies a pattern of older women expanding their networks, challenging earlier theories that networks decrease following retirement.  The chapter challenges theories of trust increasing with time, suggesting that repeated negative experiences can decrease trust, leading to people choosing not to engage and so networks and consequent opportunities to share knowledge and resources being limited.  Motivation and skill in judging when to challenge and when to build alliances, thereby developing second-circle relationships into third-circle relationships and vice versa appear more important in the process of securing relationships with those in positions of power who can award legitimacy.  Whilst concurring in part with earlier theories of Boundary Spanners, this research concludes that the role requires a level of independence that is unlikely to be held by someone in an employed role.  The research finds examples of older people who clearly have the skill to take on this role.  Barriers to older people taking on this role, or from otherwise engaging in the mechanisms and structures associated with the Strategy, arise from over-burdensome demands of time, formality and administration.

## Network Theory

Theories concerned with networks of individuals and organisational networks are used to address questions of whether some approaches to collaboration may lead to people being excluded from the process.

### *Networks of Individuals*

Convoy theory is used to consider the function and role that other individuals and groups play in the lives of the people involved in this study.

Developed by Kahn and Antonucci (1980), the term *convoy* is used to describe the layers of family, friends and associates which surround an individual and support them through life's course. The model presents an image of 3 concentric circles:

> "Each of these circles is considered to represent different levels of closeness to the focal person. Individuals in the inner circle are viewed as the most important support providers and support recipients; they are those people with whom the focal person feels very close. These relationships transcend role requirements, are relatively stable over the life span, and include the exchange of many different types of support. Memberships in the second-circle suggest a degree of closeness and relationships that are more than the simple fulfillment of role requirements. And finally, members of the third-circle are thought to be close to the focal person but usually in a very role-prescribed manner. Thus, one might have a close and important relationship with a co-worker, but this relationship does not transcend the work environment or persist after retirement."
>
> (Antonucci & Akiyama 1987, 519)

### *Organisational networks*

This study considers people in their "whole life", not just their life within a specific occupation or role. To do this, it follows the approach of Provan et al (2007) in their review of the empirical literature on whole networks. This found that:

> "it is not always clear exactly what organisational scholars are talking about when they use the term. Even the term *network* is not always used. Many who study business, community, and other organisational networks prefer to talk about partnerships, strategic alliances, interorganisational relationships, coalitions, cooperative arrangements, or collaborative agreements"
>
> (Provan 2007, 480)

The review identifies structural issues commonly examined and used to explain networks and network outcomes. A later review by Phelps et al identifies similar structural features of interpersonal knowledge networks research

*Fig 13: Structures features of networks*

| Structural features of networks | |
| --- | --- |
| Provan et al "whole networks", 2007 | Phelps et al "knowledge networks", 2012 |
| • *In-degree and out-degree centrality*:  does an organization occupy a central or more peripheral position in the network?<br><br>• *Closeness centrality*:  is an organization in a structural position to spread assets such as information or knowledge? | Network position |
| • *Broker relationships*:  to what extent does an organization span gaps, or structural holes, in a network? | Relational properties |
| • *Multiplexity*:  what is the strength or the relationship an organization maintains with network partners, based on the number of types of links connecting them?<br><br>• *Cliques*:  cliques are clusters of three or more organizations connected to one another.  Connectedness to a clique may affect organisational outcomes | Nodal properties |

Of relevance to this research, Phelps et al note that research into interpersonal knowledge networks has tended to consider only one type of relationship and so only

one type of network.  They state that this is an important area for future research to address as:

> "Multiplexity – the extent to which two actors maintain more than one type of substantive tie with each other – can increase trust between actors, their access to each other's knowledge, and their social influence on each other"

> (Phelps et at 2012, 1151)

The review also notes that whilst relational research shows the duration of a tie has a significant influence on knowledge transfer, structural studies do not consider how the length of time that the relationship tie has existed affects the influence of network structure or network outcomes.  They conclude:

> "Although currently unexplored in the knowledge networks literature, tie age may be an important contingency variable in explaining when a particular type of structure (ie closed vs open) will improve actor knowledge creation.  This may help in reconciling conflicting results about the influence of ego network structure on actor knowledge creation"

> (Phelps et al 2012, 1152)

### The influence of Champions or Boundary Spanners on Networks

Use is made of theory which has been developed to consider the role of those who are given, or who assume a role of bringing together individuals or organizations.

Hibbert et al (2009) considered the role of individuals they described as champions of interorganisational collaborations, arguing that the role was not necessarily the same as that of a formally appointed leader and may even have no formal designation.  Nonetheless they did propose both characteristics of such champions, what they described as the "doing" of championship, and they proposed the action, or "being" of champions. (fig 14 and fig 15 refer)

*Fig 14: Hibbert 2009, 12: " the doing of championship"*

| Aspect | Details |
|---|---|
| *Role* | • *Central*, but varying between a communication and a command stance,<br>• *Self-defined and emergent* – continual formation, as the collaboration context evolves, may be usual.<br>• *Collaboration-focussed* – the *role* is pivotal in setting a cooperative tone and developing well-informed, honest dialogue; the champion is perceived to have the role of 'honest broker'. |
| *Character* | • *Determined* – there is a belief that hard work will pay off for the collaboration.<br>• *Optimistic* – champions usually maintain an 'upbeat' tone; this may be 'natural' but it may more often be a personal struggle.<br>• *Relationship-oriented* – champions 'invest' in relationships, and this seems to be most helpful when it is sincere rather than instrumental.<br>• *Caring and concerned* – champions seem to be driven by the particular issue (or clients' concerns), or see 'giving a damn' as simply intrinsic to the kind of person they are and the communities they work in. |

*Fig 15: Hibbert 2009, 15: " the being of championship"*

| Aspect | Details |
|---|---|
| *Bridge-building* | • Establishing a network of contacts to support latent collaborations.<br>• Bringing people in as the collaboration requires them.<br>• Repairing relationships (that may have been damaged by others). |
| *Initiating* | • Taking on particularly important and significant tasks that are important to get things started.<br>• Undertaking small, symbolic actions that encourage or enable others to take part. |
| *Maintaining* | • Providing explicit direction, when it is feasible and necessary to do so.<br>• Keeping a broad and inclusive tone alive in the collaboration, so that others can engage and contribute. |

In a review of the literature regarding such individuals, Williams adopts the term "boundary spanner" and suggests 2 types of such role:

> "The first are individuals who have a dedicated job role or responsibility to work in multi-organisational / multi-sectoral settings …..  The second type of boundary spanners is those large numbers of Individuals (practitioners, managers and leaders) who undertake boundary spanning activities as part of a mainstream job role."

> (Williams, P.  2010, 7)

Williams also identifies and describes  the roles and competencies required of a successful boundary spanner:

Fig 16: Based on Williams 2010, 12

| Reticulist | <ul><li>Networking</li><li>Managing accountabilities</li><li>Appreciates different modes of governance</li><li>Political skills</li><li>diplomacy</li></ul> |
| --- | --- |
| Entrepreneur | <ul><li>brokering</li><li>entrepreneurial</li><li>innovative and creative</li><li>tolerates risk</li></ul> |
| Interpreter | <ul><li>inter-personal relationships</li><li>communication</li><li>listening and empathising</li><li>framing and sense making</li><li>building trust</li><li>tolerance of diversity and culture</li></ul> |

Williams concludes that there is a need for more research into the area of boundary spanners.  Of importance to this research, this includes a need to consider the extent to which context influences the role and behaviour of boundary spanners, and to consider situations involving the Third Sector (p 32).

These areas have been considered to some extent by Isbell in a study of boundary spanners in inter organisatization collaborations involving private, public and third sector groups in the USA.  Isbel noted the wide range of contexts in which boundary spanners are found to operate, and highlighted that the "champions" or "entrepreneurs" described by Hibbert or Williams may be influenced or motivated by more than simply the wish for the collaboration to succeed:

"The individual boundary spanner in IOCs serves as the representative of many constituencies.  The individual may represent him or herself, a specific

group, a home organization, and/or another IOC. …  Yet beyond the designation as the representative for a constituency, boundary spanners may represent themselves and other interests.  Within IOCs, some boundary spanners may even shroud their organisational affiliation for personal benefits or beliefs"

(Isbell 2012, 162)

Data for this research was collected at a time when funding to employ a designated boundary spanner, the 50+ forum Development Officer, had ended.  Consequently it contains reflections on the impact that this role, and the various people who held it, had on the Strategy collaboration.  The frameworks suggested by Hibbert and Williams also support consideration being given to other individuals who may not have a formal boundary spanner role, but whose actions and characteristics align them with this role even though they may never claim the title for themselves.

## Findings:  Networks of Individuals

Of those who spoke about their personal networks, many described having a rich mix of family and friends, often spread over a wide geographic area and of a wide age range.  Map 1 below indicates the richness of these networks.  As well as showing many and varied links with statutory and formal voluntary organizations, the network map also indicates the importance of social groups and faith based groups, both to members of the Forum and AWF and to the Town Centre and CAMRA pubs and Village Walking Group.  Generally, action based voluntary groups, social groups and faith groups have more links to older people than decision-making groups such as the CVSC, Health Board or Welsh Government

Map 1

| | organizations |
|---|---|
| | individuals |



As mentioned in Chapter 4, the value ascribed to having a life-long partner or spouse was evident in the number of references made to widowhood being a motivation for becoming involved in an activity which drew on or developed relationships in what convoy theory would describe as the second-circle. Such examples would include the man who said that he joined the Village Walking Group because he was recently widowed, and the men who met at the Town Centre Pub because "we're all widowed, we're all on our own". The value placed on such relationships was also reflected in Maria's comparison of her life with that of her sister Margot, who

appeared to have a very affluent life-style with frequent holidays abroad. Margot had been widowed for many years, whilst Maria's husband was still alive and this led Maria to comment "I'm the lucky one". The isolation that can result from the death of a partner was described vividly by a woman in the Village Walking Group who had a very rich middle and outer network of family, friends and associates, partly due to being involved in a range of voluntary organizations, to living in the same village all her life and to retaining links with teaching colleagues:

> *When my husband first died, I always went in to town by bus, even though I had a car. Because that way I'd get to speak to someone. I remember you phoning me up one day (indicated another group member) and you said my voice sounded funny, and I said, that's because you're the first person for me to speak to today. But on the bus, you know you'll always see someone you know.*

For many women, retirement was a trigger for relationships to move from being simply role-prescribed (third-circle) to providing a greater level of closeness (second-circle). These women spoke of meeting to socialise with past colleagues, often doing activities which were completely different from the roles which they had when working together. Although failure to mention this does not mean it didn't occur, such changes in relationships were not mentioned by any men. The recently widowed man in the Village Walking Group spoke of having had a long career in local government, but did not refer to any continuing relationships with colleagues and joined the walking group in order to meet people following the death of his wife. John had had a gradual move from full-time work to retirement, and Mark had moved to a part-time job in the voluntary sector following retirement from the Police, but neither made reference to continuing links with past colleagues.

Relatively few men were involved in this study. As noted in the earlier chapter, the majority of members of the 50+ Forum, AWF and the Village Walking Group were women. It was common for women with husbands to speak of them giving time, and actively contributing to the lives of those within their first-circle. For example Maria spoke of her husband giving practical help to their sister-in-law. However, there was little evidence of men wishing to cultivate relationships outside this close group. The only man in the Village Walking Group who attended regularly was the one recently

widowed and he had not identified the group himself, he had been put in touch with the group by his son. Furthermore he emphasised that the group suited him better than other voluntary activity because it did not interfere with the time he wished to spend with his children and grandchildren. John referred to the danger of social isolation for older men, praising the role of luncheon clubs with regard to this:

*I think the biggest gainers of that are men, it's true. You see once a week they have to get washed and dressed and shaved to go out for lunch.*

The pattern of women extending their networks through joining formal groups and committees, with men avoiding them, is most striking when comparing the response of Deborah and Sharon with the men who met at the Town centre pub. The men were dismissive and possibly suspicious of the concept of committees. One, who lived in a sheltered housing complex, made the comment:

*"They've started a Committee with us (warden controlled flats), and I'm totally against it. I'm against it because the warden was doing a perfectly good job as it was, and we don't need no committee. I told them, I came here to live, not to join no committee. I just leaves them to get on with it."*

In their interview, Deborah and Sharon spoke of how they both were socially isolated before they become involved in the Forum:

*Llinos: so you've been up here a long time then*

*Sharon: Yeah, though I didn't do anything until I joined this lunch club, which I was in for about 6 months, then I joined this forum. I didn't do any socialising at all*

*Llinos: So compared with Hillary, who I've had contact with for years and years who's involved with lots of different ….. you're not ..*

*Sharon: No*

*Deborah: Well, I had to give up work due to ill health and I thought, there's no way I want to sit on my butt doing nothing. I needed to do something, I was just over 50 at the time, 53, so I thought, I'm in that age group."*

Sharon and Deborah had little experience of developing third-circle, formal relationships, but the Forum provided an opportunity for them to develop such networks and break down their isolation. Even though, as a result of spending most of their earlier lives in paid employment, men were likely to have more experience of third-circle, role-based relationships, they generally appeared to prefer to dedicate their energy to first-circle relationships. Many, including the recently widowed man in the Village Walking Group and the men in the Town Centre Pub, only extended this to second-circle relationships if absolutely necessary. Possibly Deborah and Sharon did not feel that they had the opportunity to develop second-circle relationships as easily as the men in the Town Centre Pub. It is unlikely that an older woman would have been able to join a social group in the same way simply by sitting in a pub, and so they may not have felt they had the opportunity "to live, not to join no committee". The behaviour of the men goes some way towards resolving the questions raised in the earlier chapter on Motivation of men not being members of the 50+ Forum. Third-circle relationships, such as through membership of the 50+ Forum or AWF, needed to provide some opportunities for developing or sustaining second-circle relationships alongside more formal, third-circle relationships, if men were to be motivated to join.

It is not surprising, given its lack of social function, that there was little evidence of close friendship ties between members of the 50+ Forum and that these relationships were predominantly third-circle, role-focused. There were three exceptions. Alice and Jennifer had met when working in the health service and now rarely did anything apart from each other, partly but not entirely due to Jennifer's no longer having a guide dog. Maria and Margot were sisters and had always shared interests. Both these examples pre-dated the formation of the Forum. Sharon and Deborah appeared to be the only people to have formed a friendship through meeting at the 50+ Forum and their shared experience both of being heavily involved

and now of not having such involvement led to them providing important support to each other:

> *Deborah: So we have had our uses but, I don't know about you, but I need to be needed, but at the moment ….. not*

> *Sharon: No, we're just getting kicked at every corner, aren't we. And, you can feel yourself going backwards in your own mind, and you're losing your confidence and you're getting to the point where ….. what's the point of going out. So I'm going backwards….*

> *Llinos: that's not good is it*

> *Deborah: that's why we try and meet up once a week and have a good chat and this kind of thing otherwise we won't see each other from one meeting to the next which is ….. we saw each other on a regular basis didn't we?*

> *Sharon: Every day almost*

> *Deborah: And here we are …. But it was good. It kept this (points to head)*

Many 50+ Forum members spoke of developing a mix of second and third-circle relationships through various voluntary activities. Unlike Deborah and Sharon however, rather than third-circle, role-based relationships developing into closer, second-circle relationships over time, most movement appeared to go in the other direction. Forum members spoke of being invited to join more and more groups, developing more role-based relationships, which sometimes risked damaging second or first-circle relationships. For example, time demands on first-circle relationships was given as a reason for Maria and Bronwen limiting their involvement with the 50+ Forum. (This was also the reason given by a woman in the Village Walking Group for not taking up an opportunity to be a Treasurer of another voluntary organisation).

An ability to cultivate and increase third-circle, role-based networks was admired by many members of the50+ Forum, although they may not have wished to do this themselves. It was a main reason for Alice and Jennifer's praise of Hillary:

*Alice: I do hope that Hillary can continue for another 12 months certainly, because she knows a lot of people , she's got a lot of experience with this sort of thing, with the voluntary side of things.*

Hillary was very conscious of the benefits of using links with people in her second-circle to develop links in her third-circle, making reference to how this had been important throughout her life. She attributed her having been able to go to university in the 1940's to the influence of her employer, rather than her own academic ability:

*Llinos: You must have been unusual. How many girls in your school went to university?*

*Hillary: Not many really. I couldn't get in, I wanted to go at the time that the ex-servicemen were going to university. But then I went to work, and the director of research knew everyone, and he put a word in, and I got a place, see, in Cardiff, but didn't have any grant. Looking back, I could have, but my parents weren't used to doing anything like that, so I had to stay in the YWCA. But it was a wonderful experience of how to do it, because the people in the YWCA , the Reardon Smiths, the person who was working with the YWCA was a Reardon Smith, so you got to know, you know. And the warden, she was a really cultured lady, oh . So, I stayed there 3 years, then I came back to work, then I went to the States to do a degree there …. Had a good time there too. I've been lucky really. Very, very lucky.*

Hillary described her very first experience of voluntary action, establishing a Pre-School Playgroup by inviting other mothers to a meeting in her garden:

*Knocking on doors, asking people to bring their own chairs and a picnic, meeting went on to 11 at night*

When the playgroup faced difficulty getting use of the village hall, the group (led by Hillary) used a link with one mother's second-circle to establish a link with someone who would support them in a third-circle/role-prescribed setting:

*Our first battle was to get a room for the play group. There was a bridge club, and no way were they going to allow a play group ……. Negotiation. We did have , one of our mothers was Angharad, the daughter of Lord M, he was an*

*MP and he was elevated. We had a fund raising effort in the Institute, and we invited Lord M to open it, and there was no way the committee was going to ..*

When interviewed and when observed, Hillary made frequent references to her links with politicians and people within the Welsh Government, local authority and other statutory and voluntary services. Although her health was not good and she spoke of needing to decrease her involvement with the 50+ Forum and decrease time spent travelling, Hillary still retained her position as the first point of contact with these organizations and individuals. As she said of herself:

*(They) know that if Hillary says she's going to do something, she'll do it. You know, that's not bragging, that's just how it is. And so I'm old enough to have seen a lot of people go through the steps and I know the good and I know the bad.*

## Findings: Organisational networks

### *Structure*

A network map representation of the transactions which take place between older people and organizations involved with the Strategy for Older People would place individual older people at the centre of decision-making, planning and implementation.

Map 2
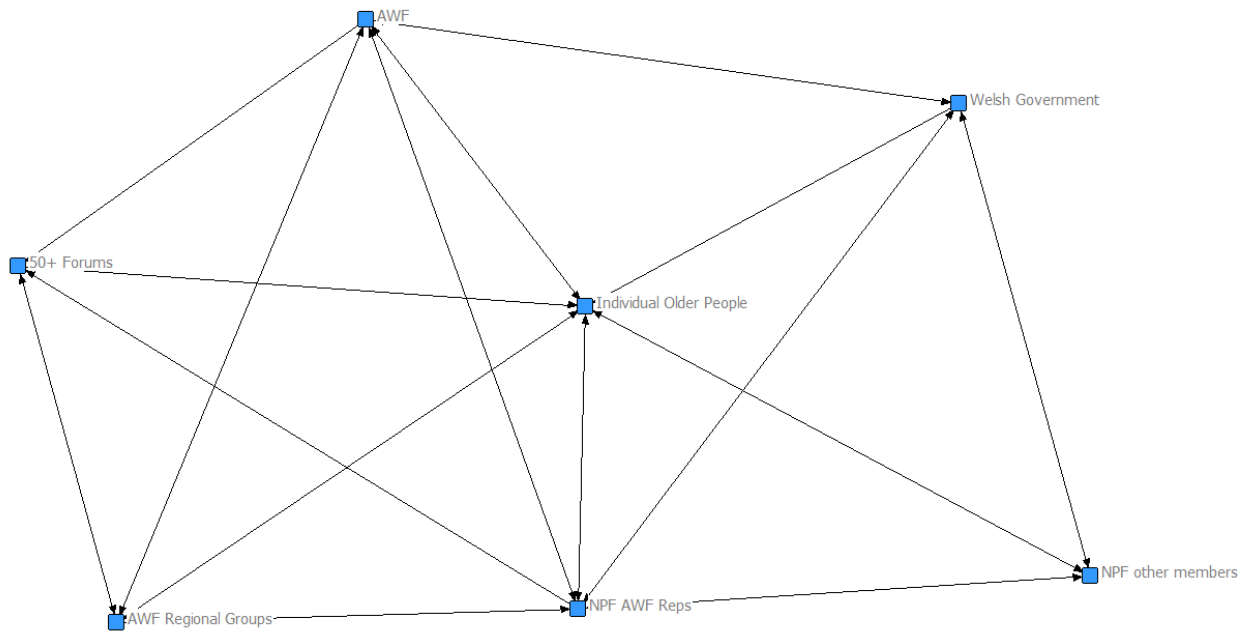


Individual older people have links with all of the six other players; 50+ forums, AWF regional groups, AWF, National Partnership Forum AWF representatives, other NPF representatives and the Welsh Government. This centrality of individual older people might suggest that older people have an important and powerful role. However, a distinction needs to be made between "older people", referred to in the Strategy for Older People as anyone over the age of 50, and the many and various individuals who can be included in this group. Not all older people have the links suggested in this map, and as noted in the earlier chapter on Legitimacy, those who do cannot be assumed to have links with other older people.

***Are organizations networked with older people?***

Many members of the 50+ Forum and AWF made reference to places or activities which implied that they shared links with other people involved in the study.   For example John, 4 members of the 50+ Forum and 5 members of the Village Walking Group had been volunteers at the local hospital and local hospice.  Members of the Forum and AWF spoke of frequenting the Town Centre Pub used for this study, apparently for the reasons given by the men interviewed there:  it was warm and clean, food was cheap and people were not expected to keep spending money if they chose to stay there for long periods.

Map 3

| | Society or group |
| | Data sample groups |
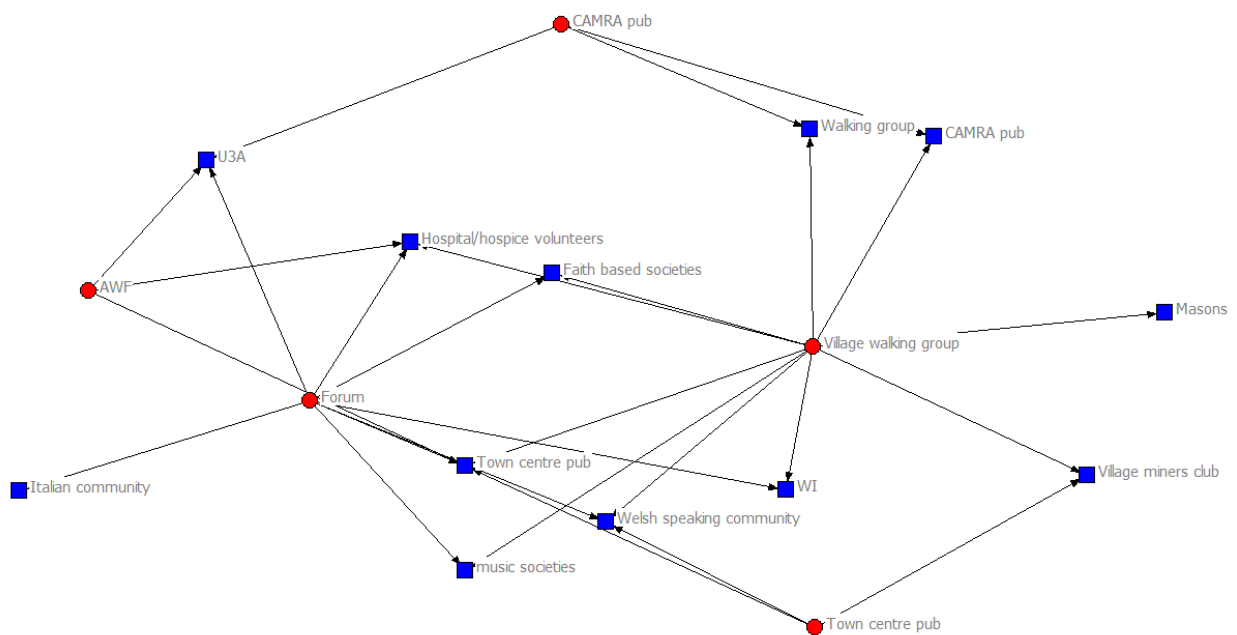


This supports the suggestion made in the earlier chapter on Legitimacy that they were suitably placed to share information, knowledge or experience with other older people, or to share information, knowledge or experience about older people with decision makers. At the same time, as the map shows, the Village Walking Group had more links with community groups than the Forum or AWF. As outlined in the earlier chapter on Methods, these maps need to be treated with caution as the data were not collected using standard, quantitative methods. Data were collected through gathering un-directed comments made during semi-structured interviews, observations and accompaniment. It is possible that members of AWF had more links than were identified during the research period, and so AWF's legitimacy to

represent other older people, based on AWF members being active in the local community and sharing experience, should not be questioned. However, the richness of links held by the Village Walking Group would give them an equal level of legitimacy, should they wish to claim it and so raises questions of why such groups are not approached to act as the legitimate representatives of other older people. What the Village Walking Group did not provide were the "mechanisms and structures" for members to contribute to the decision-making process. Whilst the Literature Review found examples of different methods of engaging with older people, none involved requiring a statutory sector employee to wander across fields or otherwise put themselves in a situation or share an activity where the older people may feel very comfortable but they may not (WLGA 2009, 5-7). The Village Walking Group members may have been able to claim legitimacy based on being active in their community or having shared experience, but they did not have legitimacy conferred by those in positions of power, mainly because they had only a very frail network tie to enable this to take place

Although the Village Walking Group had a rich network of contacts, they were mostly with action based groups, or with social groups which may have included an element of peer or community support but on a below the radar level. Although many suggested that they were skilled and assertive, they showed little motivation to move into a position where they might be invited to join a decision-making group. As one woman commented:

> Oh, I can't be bothered with committees and stuff like that. I'm more of a doing person than a sitting around talking about it type. And anyway, in those committees as such, I find a lot of it just goes over my head

As part of the Volunteer Walk Leader role, some were invited to attend meetings with the Council to discuss footpaths, but the invitation was not welcomed. One leader spoke of being cautious of reporting issues at these meetings, because the Council would then expect her to visit the area again and report back on progress. This is an example of legitimacy being conferred by those in positions of power, but it being declined. The Volunteer Walk Leader may have had the skills, the personal experience, the links with other older people and the approval of those in power, but she wasn't motivated to attend meetings, she was motivated to go for walks.

Map 3 also illustrates the very low number of ties held by the, predominantly male, members of the Town Centre Pub and CAMRA pub. Furthermore, all their links are with informal, below the radar groups, rather than formal action or policy based groups. Consequently, these were even less likely to move to a position of being able to contribute to decisions affecting the lives of older people through being given legitimacy, or the opportunity to do so, by those in positions of power.

***Is the whole organization networked with older people, or is it just certain members?***

Mapping on an individual level shows how organization networks develop and are possibly dependent on individuals rather than the organization itself. Map 4 indicates how many of the links with statutory and established voluntary organizations are based on the networks of relatively few individuals.

Map 4

| | Society or group |
| --- | --- |
| | Individuals |

CAMRA Pub
Town centre pub
AWF B
Village walking group
AWF C
AWF D
Forum Maria
Forum Margot
AWF Kenneth
Forum Elaine
Social groups
Forum Bronwen
AWF Regional Chair
AWF local region
Action based voluntary groups
Forum A
Forum Lucia
Faith groups
AWF A
Forum Emma Forum May
Forum
AWF
Forum Liz
Council
Forum Janet
dignitaries, royalty etc
AWF John
Forum Hillary
NPF other members
WCVA
CVSC
Forum Alice & Jennifer
Forum Catherine
UK government
Health Board
Forum Sharon
Regional vol org
Forum Deborah
Other strategic planning groups
Welsh Government

Within the 50+ Forum, most links are held by Hillary, Lucia, Janet, Alice and Jennifer. Other members, such as Maria and Bronwen, have far fewer links and are almost as isolated from statutory and voluntary sector decision makers as those in the Village Walking Group, CAMRA pub or Town Centre Pub.   Even Sharon and Deborah, who had been active and dedicated members of the Forum since its establishment, have relatively few links.

Map 4 also shows the isolation of most of the members of the local AWF group. Unlike the members of the Forum, these were not generally active in other voluntary

organizations, or networked with other statutory organizations.  Their links were dependant on John, and to a lesser extent, Lucia.  This lack of networks with decision-making bodies may be a reflection of John's determination to make links with people who were generally not involved in the decision-making processes associated with the Strategy for Older People, reflecting his belief that organizations such as the 50+ Forum attracted people who were assertive, articulate and privileged:

> *John:  Yes, they're the very people you don't want to hear from!  Because they've got big mouths, they can talk for themselves, represent themselves, don't matter what I can do.  As a member of the Forum, you don't mean anything, but what you can bring to the table is …. Like the lunch clubs.  Now I'm a firm believer of the lunch clubs in this country, in Wales in particular.  It's the one place, it's a mine of information.  This is where all the people who no one represents go for lunch and they talk too.*

> *continues*

> *But, as I said, this is where it's at, this is where the people with just £30 can go.  They don't go to forum meetings.  They can't afford it!  You know, it might mean a new coat, or handbag or something, you know.  And that would be, just to go to a meeting, because they don't want to look dowdy, so , they don't have anything to change, so.  But they go there with all their friends, so the forum would be …. So, they're not forum people.  So, that's where you go to find out what it's all about.  That's where I discovered that fear of hospitals, plenty, to sort it out for themselves.*

**"Well they asked me to join …..":  Individuals, organizations and cliques**

Reflecting the finding above concerning Forum members tending to use second-circle relationships to cultivate third-circle relationships, there were clusters of Forum

members who shared links with other organizations, notably the CVSC and local Health Board.  Hillary, Alice, Jennifer and Janet had all been founder members of the CVSC, and Hillary and Janet were current Trustees.  Emma had been employed by the CVSC for many years, and her role had included responsibility for taking minutes at 50+ Forum meetings.  When Emma retired, she joined the Forum and continued as minute secretary for at least a year.  She also maintained her relationships with many CVSC  employees, with these relationships being partly role-based and partly social.  Four members of the 50+ Forum were current or past members of the CHC and had been involved in groups concerned with planning and strategy development in health services for many years.

Map 5

| | |
|---|---|
| ■ | Society or group |
| ■ | Individuals |

Whilst all might have had a very strong interest in the development of the voluntary sector, or in health services, this clustering appeared to be the result of people being invited to join groups because they were already in groups, rather than because of an individual wish to apply for membership. Almost all members of the 50+ Forum also had links with the Council. Liz was a past employee and was Secretary of the UNISON Retired Members group and so had regular contact with Council officers at formal meetings and at social events. Janet was an elected Member, and had been employed for over 20 years by a tenants' organisation which was funded by the Council. During Forum meetings, it was evident that most people had a clear knowledge of the structure of the Council and the identity of senior officers. Many made reference to current or past involvement in committees or groups which involved Council representation and there were many suggestions that Council officers or their relations were known in both role-based and social capacities. For example, when discussing a proposal to invite the newly appointed Chief Executive to a Forum meeting, Lucia said that she would be able to speak to the Chief Executive directly as she was in the process of making her wedding dress. Alice and Jennifer also had an indirect link with the NPF through their involvement with a region-wide voluntary organisation which provided services for older people, and Liz had an indirect link through her involvement with UNISON.

### *Influence of time on networks*

For the people involved in this research, the age of network links can be measured differently from that of many studies of networks or organisational relationships. Whilst links between players within an organisation or between organizations often may be measured in months or periods of less than a decade, Alice, Jennifer, Janet and Hillary had all been involved with local and national government bodies and voluntary organizations for 50 years. Others had ties which had been built up over a far shorter period of time, notably Deborah, Sharon and John. However, even these "new" relationships had existed for more than 5 years. Weighting relationship links according to the length of time that they had existed highlights not just the differences in the number of links that different players have with different

organizations, but allows consideration of the influence that time may have on the quality and type of relationship.

Map 6

| | |
|---|---|
| → | 2-5years |
| → | 5-10 years |
| → | 10 - 25  years |
| → | >25 years |
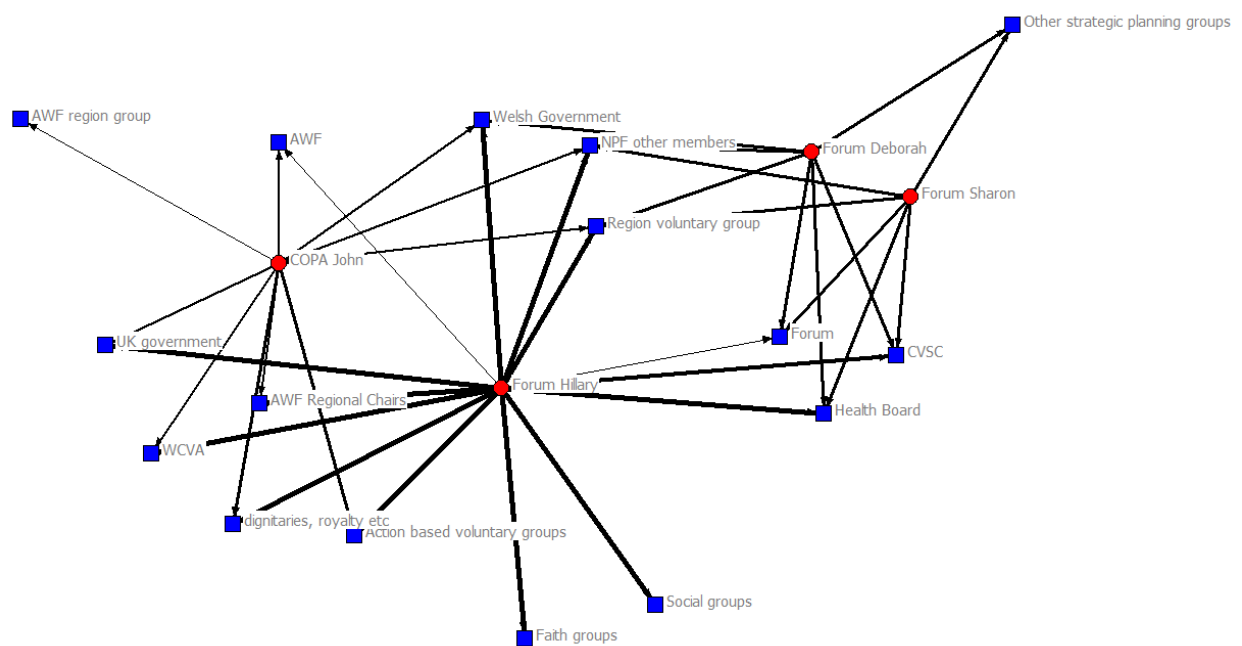


John had built up far more ties than Deborah and Sharon, in a shorter period of time. However, none could compare with Hillary who not only had most ties, but had ties which had existed for many decades. The map also highlights how Hillary's ties with the 50+ Forum are so recent, that initially they can be difficult to spot.

As discussed earlier, relationships between people involved with the 50+ Forum were primarily role-based.  There was evidence that the age length of relationships could lead to greater trust, based on positive past experiences.  For example, Alice and Jennifer had great trust in Hillary's ability to progress the Forum, based on their previous experience of working with her.  However, previous poor experiences also had an impact on the quality of current relationships.  Janet had worked alongside Hillary for 50 years, but the experience had been less positive and this was reflected in many of her comments about Hillary.  This included a belief that people had left the Forum or refused to join because they were put off by Hillary's manner.  Hillary's own comments about the benefits of knowing people over time also suggested that this did not automatically lead to the development of trust, but she clearly valued the ability to make a judgement as a result of having had the time to build knowledge of a person.  In her own words:

> *I know the good and I know the bad*

Although Deborah, Sharon and John had built up their networks over a shorter period of time, their patterns of relationships differed from each other.   Deborah and Sharon had few links outside of the Forum:  both had moved to the area, Deborah had no family living in the area, and both said that they were not involved in any other social or voluntary groups.  Deborah and Sharon's ties through the 50+ Forum were limited to voluntary or statutory organizations within the area of the county borough, and relationships with the individuals in these organizations appeared purely role-based.  This was evident from the way these relationships ended abruptly when the inter-agency Programme meetings ended:

> *You had your dates for the meetings for the year, turned up …… cancelled.  I was told via the CVSC  that there would be no more meetings.*

Deborah and Sharon made no references to suggest that these relationships had developed into more social, second-circle relationships.  Although they believed that they had contributed and achieved a great deal regarding the Older People's Strategy, they were also aware that this may not have been a positive experience for others.

> *Nine out of 10 times we know more than they did. We got well known, perhaps they didn't like it. We were telling them their job, they were being paid to do. With the finance cuts, people moved on, but they haven't notified us. We got good at remembering who was in different posts, now there's no continuity. We kept telling them, you need continuity. Now we have no idea who to go to.*

As their relationship had been purely role-based, their opportunities for securing another role were limited.

Over a similar period of time, John had developed links with organizations and individuals outside of the local area. These organizations were not as inter-dependent as organizations operating within a single local authority area, and were not dependent on funding or support from a single Council. As previously discussed, John felt that developing role-based relationships into more social relationships was important, and made many references to social events taking place alongside formal meetings. For example, when inviting me to accompany him to a AWF event in South Wales, I was also invited to join a group for dinner afterwards: they were having a meal together partly to avoid the early rush-hour traffic from Cardiff, and partly to support one member who was recently widowed and found eating alone difficult. Whilst some individuals reported having very negative experiences of John, it was clear that he established very positive relationships with other people. He was similar to Hillary in his habit of mentioning the positive relationships he had with people in positions of power, for example:

> *Hillary: "I happened to bump into the Minister the other day and …."*

> *John: "I'll be meeting up with Sarah, the (Older People's) Commissioner, for a coffee soon and …"*

Building links with a range of organizations, and developing relationships from purely role-based to more social-based relationships, appears more important than the age of ties on John's opportunities for securing further roles.

### *Are organizations networked with decision makers?*

Although the Forum and AWF links with community groups appeared no stronger than those of the Village Walking Group, they had multiple links with planning groups, statutory organizations and established voluntary organizations. This was evident on an organisation basis – Map 7 refers:

Map 7

| | |
|---|---|
| ⬛ | Society or group |
| 🟥 | Data sample groups |



This map highlights the quantity of links between the Forum and/or AWF and established, influential groups, as well as the lack of engagement between these

organizations and the CAMRA pub, Town Centre Pub and Village walking group. However, within the Forum and AWF, Hillary and John were the only ones who could claim to be linked with all the statutory and established voluntary organizations involved in making decisions which affected the Strategy for Older People. They were the only people in a strong position to share or spread assets such as information or knowledge. As such, they were also in a position to act as gatekeepers, hindering such assets from being shared. Although both the regional AWF group and the 50+ Forum could be viewed to have strong network ties with many organizations, these ties were really held by Hillary and John, and not by the organizations as a whole.

## Findings:  The influence of Champions and Boundary Spanners on Networks

### Who are the boundary spanners?

In his writing on boundary spanners, Williams highlights the need to consider the influence of individuals who have not been appointed by a statutory organisation to fulfil the role of boundary spanner or champion. When the 50+ Forum was first established, it had very limited funding and no paid officer and so the work associated with boundary spanners was carried out by its members on a voluntary basis. For a period, the Council used part of the Welsh Government awarded Strategy funding for a Development Officer post, employed through the CVSC. About 12 months before data were collected, the Council decided to discontinue funding the post, as a result of a reduction of Strategy funding from the Welsh Government. The last person to hold this post was Mark, who continued to be involved with the Forum as an individual member. At the time that data were being collected, responsibility for the work associated with boundary spanners was once more left with volunteer members.  In order to develop AWF throughout Wales, a boundary spanner role was also assumed by John and the other Regional Chairs of AWF.

***Employed by whom?***

Although most people mentioned the former Development Officer in their interviews, and his work was often discussed at Forum meetings, Mark's role and the identity of his employer was unclear.  Deborah and Sharon spoke of the first Development Officer "originating from the CVSC" and said that they were on the interview panel when Mark was appointed.  However, they were unclear whether the interview was for a Council post, with the CVSC and the 50+ Forum involved as advisors, or a CVSC post with the  Council and Forum as advisors.  There was no indication that it was a post controlled by the 50+ Forum, and Deborah and Sharon spoke of their role on the interview panel as being that of advisors, not of decision makers.

When in post, although many people were very appreciative of the work that was done, there was no indication that the 50+ Forum could direct it.  Maria described Mark as:

> *brilliant.  And we had another young lady before him.  And they were good, and they were paid to help us through, which was really good.*

Unless asked directly, no one made any reference to the identity of the Development Officer's employer.  Emma described the Development Officer as:

> *a member of forum staff who worked in the CVSC*

Bronwen described the Development Officer role as:

> *sort of half and half you know.  Because we provided some of the money for him, but he was also belonging to the Council if you know what I mean.  But they were very good*

John's understanding was that the Development Officer had originally been employed by the Council, and had later been employed by the CVSC through a service level agreement.  He saw this as a way for each organisation to benefit from Strategy funding and increase their own resources for staff and office space.  His described the arrangement:

*You see, there's nothing in the Strategy that says, "my job today is …. Rent officer. Now if they call me 'rent officer involved with older people', they can pay part of my salary from the Strategy for Older People". Quite legitimate, there's nothing wrong with that at all. Because partly Tom's a rent officer, but dealing with older people. So there was some creative book keeping which caused financial problems (for the 50+ forum).*

John then spoke of instances when the Forum had been unable to use the Development Officer's time, or even the Development Officer's desk, because it was a shared resource which the responsible organisation was using for other things.

Mark was able to give some clarity to the question of the identity of his employer, but it was not straightforward. Mark said that the Council had used part of the Strategy money to employ a Coordinator within the Council, and a Development Officer through the CVSC. He was recruited and appointed by the CVSC:

*because the Welsh Assembly Government paid for this post, paid it to the County Council, who sort of policed it, and made sure things were being done. But I was actually based in the CVSC, and managed by the CVSC*

When Mark had been in post for about 2 years, the Coordinator post was vacant and Strategy funding was starting to be reduced:

*because they didn't have a coordinator, an older people's coordinator working at the Council, they decided they would combine the role. And money was getting tight, so they decided to combine the coordinator's role with the development officer, so you worked across the Council and development officer for the forum. And I had several heated discussions before that, … and I had various heated discussions because I said, it's not going to work. Because the development officer's job was to be independent of any of the people they were complaining about. I couldn't stir up the forum, and suggest ways that they could complain about council departments, WAG, if tomorrow, I'm paid by them, and "what's happening with the forum?"*

Whilst these discussions were taking place, Mark had an opportunity of a secondment to another post within the CVSC, which he took and his post was given

to another member of CVSC staff.  He returned to his post for a period of months before funding for the post ended.

Employing and managing staff is a serious responsibility and something which volunteers may not wish to take on.  Therefore it's possible that Forum members were content to accept that the Development Officer was not their employee as long as he was acting in their interest.  Mark and John had a very poor relationship with each other and appear to have agreed on very little.  However, they both suggest that for the Development Officer to be a successful boundary spanner, the "caring and concerned" characteristics described by Hibbert need to be stronger than just "giving a damn" (2009,10).  It would be difficult to express these characteristics in an employment arrangement which limited action, either by controlling the person's activities and associated resources, or by demanding loyalty to conflicting interests.  Rather, the Development Officer would be in a position similar to that described by Isbell, shrouding their organisational affiliation for the employer's benefits or beliefs.


*Doing what?*


Both Hibbert and Williams describe the boundary spanner role as being very action orientated.  Hibbert speaks of bridge-building, initiating and maintaining relationships between different groups, whilst Williams speaks of being a reticulist, entrepreneur and interpreter.

These roles were taken on in a voluntary capacity by both Hillary and John.  They were both collaboration focused, they both cared about issues facing older people, and they both displayed high levels of skill at developing and maintaining networks with a range of individuals and groups in order to achieve their aims.  These roles were also taken on by other members of the 50+ Forum.  For example, after Mark had left there was confusion over the action he had taken on a joint project with the Council and local businesses.  Liz used her established networks to contact the relevant Senior Officer in the Council, establish what had been done and agree what the next steps should be.

> *So I wrote to (the senior officer), because I know him and I've worked with him over the years. And to be fair, he rang me, and he did reply to my letter. And he said they were trying very hard, and they were going to do this*

Liz took this action on her own initiative; she was not mandated to do so by the 50+ Forum Executive. Similarly, Alice was an important bridge-builder between the Forum (or at least, Hillary) and a regional voluntary organisation for older people, which may have been a potential competitor. During observed meetings, Alice made repeated attempts to progress a decision to invite the Chief Executive of the organisation to a Forum meeting, emphasising her belief that it would be mutually beneficial for the organizations to work together. When discussing plans for a public event, Alice was quick to allay Hillary's accusation that the organisation was working against the Forum's interests:

> *The meeting went on to discuss practical arrangements for the event at the university*
>
> *Alice announced that the organisation had made their own arrangements for the event*
>
> *Hillary responded: "Well, that's a bit naughty of them!"*
>
> *Alice back-tracked, pacifying and emphasising that the organisation would only be providing their own information literature: "They're not working against us Hillary"*
>
> *Executive meeting, May 2012*

There was no evidence to suggest that the 50+ Forum or AWF needed an employed Development Officer to take on a boundary spanner role because the members were not suitably skilled to do this for themselves. When there had been a person in such a post, it seemed that what was valued most was having someone to provide administrative support and having the visible presence that having an office provided. John described this as:

> *a development officer was handy, but, it's a lot of money for what they did. It's not a full time job. It needs to be … 2 days a week job would be sufficient. It would give you a central point to go to, if you will*

When the Development Officer was no longer in post, many people spoke of the 50+ Forum suffering because of a lack of administrative support. People also voiced concern that there were reports that the Forum no longer existed because there was no longer a paid officer and there was not an identifiable focal point, such as an office. However, no one spoke of the need for any other support.

When describing his role, Mark emphasised that he was an advisor and a facilitator, but he could not prescribe:

> *I wasn't the Forum, I didn't run it. I couldn't say "you can't do this, you can't do that". I could make suggestions and say, "oh hang on, the constitution says you can't do that, the Welsh Government won't let you do that". To make suggestions, to guide them, and I wouldn't use the word manipulate (laugh)*

Mark was also very aware that he did not have control over forum members:

> *The difficulty in being in a development officer's job is that they're all different people, but they're all not being paid. I couldn't sack them, no one could sack them*

However, Mark also saw his role as something more than a facilitator; he developed people and gave them confidence to take action.

> *And I think I brought some organisation and planning to it, in that we'd book rooms and venues a year ahead. So all the members, not only the committee, knew what was going on. But, as I'd say, a month would go by, 6 weeks, and I'd say "you were talking about this last time, what are you doing about it", and they'd say "mumble mumble". And I, I started to introducing, whether they liked it or not, shall we have some action like, what do you think we should do. Not telling them, just "what do you think we should do?". And they were bright people, and …. "what about if we write a letter to", so I'd say "ok, who's going to do that?", and I'd say "action" and I'd get my computer,*

*and "dad a da dada".So the next meeting was, "well where are we up to?" So we had a structured approach, to lobbying, or whatever you want to call it.*

From his description of writing letters to the local press, it appears that there was a high level of trust between Mark and Forum members, and they were happy for him to take action on their behalf:

*Part of my role was to stir them up to get them to do that. And sometimes Deborah (Forum chair at that time) would come and say "that's a nice letter I put in the paper" (laugh)*

Deborah and Sharon's own descriptions of taking on new roles and growing in confidence suggests that his efforts in this were very successful.

Mark had no links with the area, neither living nor having worked in it. He used skills he had learned in his earlier career to attract new members to the 50+ Forum:

*We did a lot of ….. we used to go on the back of ….. events at first. Like there were different events, and you'd pick them up in the paper. Like local events like, I don't know, like something in a church hall, something, a luncheon club or whatever. And we'd go along, we'd have our stand, have our leaflets, and we'd talk to people, sign them up, tell them what we were doing, try to get them interested. So, we did that.*

This strategy had been extremely successful as a means of raising awareness of the organisation, and of securing a very high number of members. These included Deborah and Sharon, who had dedicated enormous amounts of energy and also developed themselves; to this extent Mark's work to engage with older people who might not otherwise become involved in progressing the Strategy for Older People was very successful.

### For how long?

Membership of the 50+ Forum decreased dramatically following the departure of the Development Officer. However rather than a dependence on an employed "boundary spanner" post, risks to the Forum's continuance appear to have arisen from the decision not to provide any social rewards for participating, and a lack of

administrative support or office base/focal point. Despite these risks, the 50+ Forum continued and secured further support from the Council. This appears to be due to the boundary spanning skills of members who came into the organisation with established skills and established networks; notably Hillary, Alice, Liz and Janet. Similarly, the AWF regional group expanded its membership. John used his personal networks to invite people to meetings and to invite speakers (the May 2013 meeting was attended by the Older People's Commissioner on his invitation). The group receives a very small amount of money from the Welsh Government for room hire, refreshments and travel costs.

Deborah and Sharon, whose networks throughout their period of involvement with the 50+ Forum had been limited to those supported by the Council and were purely role-based, were left isolated and frustrated. Their personal development and sense of achievement in improving conditions for older people should not be under-stated, but neither should the damage that they have suffered as a result of their networks and their roles being taken away from them.

## Conclusions

### *Network patterns of older women and men*

Use of Convoy theory has helped deepen understanding of the questions posed in earlier chapters of why men have been under-represented in all the formal voluntary organizations considered, and not represented at all in the 50+ Forum. Importantly, it suggests that the reasons for men's non-involvement with the 50+ Forum are more complex than a simple matter of their being unable or unwilling to cope with the strong character of the female chair. The men involved in this study have tended to invest in their first-circle relationships following retirement, investing in second-circle relationships only when first-circle relationships are reduced (such as through widowhood). Furthermore, they appear only to invest in third-circle relationships which offer opportunities to develop second-circle relationships. None, including those only recently retired, indicated that they had continuing third-circle relationships with people known from their earlier careers.

Use of convoy theory has also identified a pattern of women developing second-circle relationships from third-circle role (often work) based relationships, and these continuing after retirement in a way that was not evident in the lives of any of the men involved in this study. This pattern is contrary to the findings of Antonucci and Akiyama that third-circle relationships do not transcend the work environment or persist after retirement. The women in this study, both those involved in the 50+ Forum and others, also had a pattern of developing more and more third-circle relationships with these sometimes developing into further second-circle relationships. Although those women who chose not to increase their third-circle relationships because of demands on first-circle relationships appeared happy with their situation, it was clear that this was the reason for their predicament. It was not because they felt that they did not have the skill or the opportunity to widen their circles.

### Long standing relationships, both good and bad

The age of some ties could be counted in decades rather than years or months. As suggested by Phelps, time brought with it opportunities to develop networks and to increase knowledge. However, negative experiences of individuals appeared equally important. Notably, whilst many members of the 50+ Forum and members of the Council and CVSC viewed the chair, Hillary, as an important link in their shared network, others reported of people not joining the 50+ Forum because of previous negative experiences of working with her. Her presence was therefore contributing to the development of a more closed structure with limited knowledge creation.

### The benefits of moving from third to second-circle relationships

The age of some people's links was far shorter than those developed by Hillary, but this did not automatically put them in a weak position. The pattern of relationships developing from third to second-circle type, with this leading to people then being invited to join more groups and so develop even more third-circle relationships,

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influenced the organisation of networks and the development of what Provan describes as centralization and cliques.  This was evident in the high proportion of 50+ Forum executive members who also had links with the Council, the CVSC and with the Health Board.  It was evident in John being invited to apply for membership to the NPF as a result of his being a member of AWF, and it was evident in Lucia being invited to join the AWF regional group as an individual member (not as a representative of the 50+ Forum) through her second-circle type relationship with John.   Clearly individuals were being invited to join groups, and so cliques were developing, as a result of what Phelps describes as multiplexity leading to increased trust.  Consequently there were examples both of partnerships benefitting from external networks, as found by McClelland (2011,11) and Kreling (2006), but also of partnerships suffering from the dominance of a particular sub-group, as described by Addicott & Ferlie( 2007, 400 & 401).

Deborah and Sharon's ties were limited to the clique associated with the Council.  Experiences were not always positive, but it seems unlikely that any negativity was the sole cause of their being unable to develop further links and becoming isolated when the Programme meetings ended.  Rather, it appeared due to their relationship with other Programme Group members being entirely third-circle, role-based.  When the Programme Group stopped meeting they had no opportunity to build on those relationships and so get invited to join other groups.

Similarly Mark appears to have only developed role-based, third-circle relationships with the Welsh Government and NPF.  There are many possible reasons for this:  it might be a reflection of his previous working relationships in the Police or a reflection of the relationship between his employers and the Welsh Government.   Mark would have had fewer opportunities to develop informal relationships with the Welsh Government and NPF as attending meetings in Cardiff would have been expensive in terms of time and money.  Finally, Mark may simply not have been motivated to invest in building such relationships with individuals or organizations when he was employed on a short-term, part-time contract.  However, when the relationship between John and the CVSC broke down, Mark was unsuccessful in his attempts to persuade the Welsh Government or NPF to break their ties with John.

Negative experiences did not appear to have a detrimental effect on John's ability to build more links. Despite his negative experience with the CVSC and Council, his investment in second-circle relationships with AWF members and associates enabled him to develop links, build trust and share knowledge with the NPF, Welsh Government and Older People's Commissioner. He was clearly motivated and skilled at assessing other players and judging whether to challenge or to build alliances; the skills identified in Chapter 5 as a requirement for securing appointment as a legitimate representative of others.

*Spanning boundaries*

There was consensus that to be successful, a boundary spanner needed to be independent of the statutory bodies ultimately responsible for decision-making. This need for independence was voiced more strongly than has been described by either Hibbert, who speaks of bridge-building and maintaining, or Williams who speaks of being an entrepreneur and interpreter. Rather, it reflects the findings of Chapter 5 that representatives of older people must be prepared and able to counter attempts to intimidate or scare. This is considered further in Chapter 7, but there was a clear acknowledgement of the risk of what Isbell describes as boundary spanners representing other interests.

*Mechanisms and Structures*

Unlike many vulnerable groups who may benefit from the presence of a boundary spanner to bring together diverse groups, many of those included in the descriptor "older people" are likely to be very skilled. Although the employed Development Officer was generally liked and his efforts were appreciated by many, it is remarkable that when he was no longer in post the skills and resources which were missed were not those ascribed to a boundary spanner. People spoke of missing his computer skills, his ability to organise events, his answering the phone and his office providing a focal point for visitors and enquiries. At the point where data collection for this

research ended, the AWF regional group, which was given such support, was growing in membership, whilst the 50+ Forum members frequently spoke of being over-burdened with administrative demands and this threatening the survival of the organisation.

 The relatively small amount of funding required to provide this support can be compared to the funding required to provide the bus passes which have both motivated and empowered other people in this research; such as the men who met at the Town Centre Pub or the Village Walking Group's involvement in many formal and below the radar voluntary activities.  This research concurs with Hibbert and Williams regarding the importance of a boundary spanner role, and the data include examples of the many ways that boundary spanner competencies support and add to the achievements of a multi-sector partnership.  However these findings also suggest that, rather than this requiring investment in an employed role, in the instance of the Strategy for Older People, this can be best achieved by providing administrative and practical support.  Older people already have the competencies and can assume the role themselves; their success is limited by the distraction and demands of administration combined with a lack of funds to carry them out.

As with the conclusions of earlier chapters on Motivation and Legitimacy, analysis of the networks of groups which are not part of the "mechanisms and structures" developed to engage with older people reinforces the fact that "Committees", both very formal and informal, are isolated from the many places where older people choose to live their lives.  Many older people have the competencies required of a boundary spanner, including the requisite independence and fearlessness that this research identifies.  However, they do not necessarily have the motivation to develop third-circle networks, may not then have the skill or the opportunity to develop these into second-circle networks and so will never be awarded the legitimacy that this brings.

# Chapter 8 – Bridges or Barriers?

## Introduction

This chapter builds on the findings and conclusions of earlier chapters on motivation, legitimacy and networks.  In doing so, it aims to address the questions posed in these earlier chapters concerning the various and contradictory claims of legitimacy, the importance of networking (rather than committee-based) skills, and the influence of clique membership and allegiance.

Consideration is given to the usefulness of power theories for understanding motives and actions of individuals and established groups.  This moves from theory developed by Weber in the early 20th century of rational, traditional and charismatic sources of power (1947, 324), through to Foucault's late 20th century writings on forces of upward and downward continuity, with government described as "the right disposition of things, arranged so as to lead to a convenient end" (Foucault 1994, 16).  Thereafter, consideration is given to theories of organization and power, of whether and how power is generated and passed between organizations and individuals.  Starting with Gaventa's model of power and powerlessness (1980), consideration is then given to Mann's model of "organisational outflanking" (1986, 7), Giddens' theory of "duality of structure" (1982, 39), and Clegg's theory of "circuits of power" (1989, 27).  Finally, Moore's theory on ""damp proofers"" (1995) is used to challenge the theories of "champions" or "boundary spanners" which were presented in the earlier chapter on Networks.  The chapter finds a close association between power and networks, with contradictions being accepted because of allegiance to a clique rather than because of allegiance to a model of power.  The chapter finds examples where the strong link between networks and power is used to determine the co-production mechanism adopted, sometimes inadvertently excluding certain older people from the process of decision-making but sometimes doing so deliberately.  These findings call into question assertions that some mechanisms and structures for collaboration and co-production are inclusive because they are not dependent on traditional, formal committee skills.  In identifying clique membership

as being fundamental to being awarded legitimacy and controlling the co-production mechanism adopted, the chapter contributes to understanding of why what have been called "minorities within minorities" continue not to have a voice in the decision-making process .


## **Theories of power, authority and legitimacy**


Collaborating is in part getting other people do things with one, rather than having to act in isolation.  Theories of how people get other people to do things have been developed over centuries, dating back to the writings of Machiavelli in the early 16th century, and Hobbes in the mid 17th century.

In the first part of the 20th century, Max Weber turned attention from groups which have power to groups which do not.  Weber described the existence of "imperatively coordinated relationships", which he defined as "the probability that certain specific commands (or all commands) from a given source will be obeyed by a given group of persons" (Weber 1947, 324).  Weber suggests three pure types of legitimate authority:  rational, traditional and charismatic:

*Fig 17:  based on Weber 1947,328*
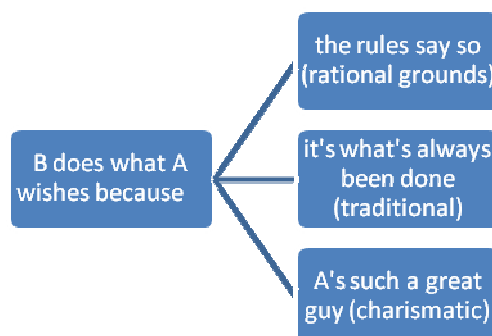
In the second half of the 20<sup>th</sup> century, working on an assumption that it is necessary to state the quiescent scope of the response when considering the influence of an individual or group on another, Robert Dahl considered power within the boundaries of an actual community (1961), defining power as something that is exercised in a community by an individual or group, while others are prevented from doing what they prefer to do. Dahl's theory is based on an assumption of a pluralistic society where individuals may hold multiple and competing views, but also one where all community members are able to contribute to the decision-making process:

> "to know whether or not we have a ruling elite, we must have a political system in which there is a difference in preferences, from time to time, among the individual human beings in the system"

<div align="right">(Dahl 1958, 464).</div>

Both Weber and Dahl were concerned with a one dimensional, overt power; a concept of power as that by which A can make B do something they would not have done had it not been for the power exercised by A. Both theories are based on a number of assumptions, namely that people recognise grievances and act to right them, that participation in power relations occurs openly in decision-making arenas, and that these arenas are open to anyone. Weber and Dahl do not view leaders as an elite, possibly with interests of their own, and so conclude that non-participation or inaction in decision-making is the result of individuals deciding not to participate. If decisions are made which are disadvantageous to those who do not participate in the decision-making process, then these non-participants are responsible for the consequences which befall them.

Bachrach and Baratz (1962) argued that these assumptions do not take account of the fact that power is often exercised by confining the scope of decision-making.

> "Of course power is exercised when A participates in the making of decisions that affect B. But power is also exercised when A devotes his energies to creating or reinforcing social and political values and institutional practices that limit the scope of the political process to public consideration of only those issues which are comparatively innocuous to A."
>
> <div align="right">(Bachrach and Baratz 1962, 3)</div>

Bachrach and Baratz considered the connection between the overt face of power - the way decisions are made - and the other, covert face of power, the ability to prevent decision-making.  Unlike the pluralistic societies of Weber and Dahl, in this model covert power is used by some to ensure that the circumstances which benefit one group relative to others are never questioned; thereby ensuring decisions to change the circumstances can never be made.

> *B does what A commands because A doesn't allow B an opportunity to help decide what should be done*

This two dimensional model assumes that the powerless are fully conscious of their condition; they know that they are not being allowed to help decide what is discussed.  It does not recognise that one result of the existing power relations is that powerless people may not be conscious of their powerless state.

The theory of power having 3 dimensions, overt, covert and latent, was developed by Lukes (1971).  Lukes agreed that, when analysing power it is necessary to consider "concrete observable behaviour" (17 - overt power), as well as non-decisions or what those in power are not allowing to be discussed (23 - covert power).  Added to this, Lukes argued that there is the power "to prevent people, to whatever degree, from having grievances by shaping their perceptions, cognitions and preferences in such a way that they accept their role in the existing order of things, either because they can see or imagine no alternative to it, or because they see it as natural and unchangeable, or because they value it as divinely ordained and beneficial" (28 – latent power).

> *B does what A wishes because B has come to believe or do things which are not in their interests but which are beneficial to the interests of A*

*Fig 18:  3 dimensions of power (based on Lukes 1974,25)*

| Overt dimension | Covert dimension | Latent dimension |
|---|---|---|
| Focus on:<br><br>• Behaviour<br>• Decision-making<br>• (key) issues<br>• Observable (overt) conflict<br>• (subjective) interests, seen as policy preferences, revealed by political participation | (Qualified) critique of behavioural focus.  Focus on:<br><br>• Decision-making and non-decision-making<br>• Issues and potential issues<br>• Observable (overt or covert) conflict<br>• (subjective) interests, seen as policy preferences or grievances | Critique of behavioural focus.  Focus on:<br>• Decision-making and control over political agenda (not necessarily through decisions)<br>• Issues and potential issues<br>• Observable (overt or covert) and latent conflict<br>• Subjective and real interests |

This was developed further by Gaventa (1980) with his phenomenon of quiescence, the silent agreement of conditions of glaring inequality.  Gaventa argued that the situation of apparent lack of conflict is a sign and a consequence of the deliberate use of power mechanisms: the purpose of power is to prevent groups from participating in the decision-making process and to obtain the passive agreement of these groups to the situation.  Agreement is not evidence of a desire not to participate in the decision-making process, as suggested by Weber and Dahl, or even evidence of conscious powerlessness to participate, as suggested by Bachrach and Baratz.  It is evidence of a mute compliance with the situation (Sadan 2004, 39 referring to Gaventa 1980).

Foucault (1996, first published 1991) recognised that practices of getting individuals or groups to behave in a particular way are not limited to the situation of a single ruler or elite group governing an entire state or population.  They occur in many different situations throughout society, for example the head of a family, the teacher of a pupil, the manager of a company.  At the same time, these different forms of government (with various B's acting in a way that various A's wish), operate within the overarching government of the single ruler or elite group.  Foucault suggested that government is the art of bringing these together:  "the task is to establish a continuity, in both an upwards and a downwards direction" (Foucault 1996, 14)

*Fig 19:  based on Foucault 1996, 14*

Upward continuity:  The person wishing to govern the state must learn how to govern himself

Downward continuity:  When a state is well run, groups and individuals know how to behave and behave as they should
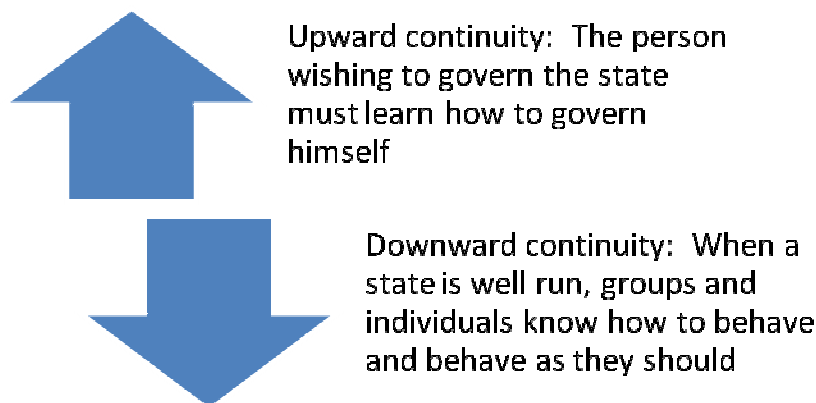
Foucault argued government is essentially concerned with how to manage individuals, goods and wealth:  " government is the right disposition of things, arranged so as to lead to a convenient end" (Foucault 1996, 16).  Within the many layers and groups that make up a society, individuals behave in a certain way not because the law compels them to, but because society (its wealth, its goods and its people) has been arranged to ensure that they do so.  However, it is important to note that Foucault is not suggesting that government is concerned with actions which lead to a common good, merely to an outcome which is most convenient for each of the things which are to be governed.

These theories provide a framework for considering, and gaining greater understanding of the power relations which exist between the main organizations and individuals involved in this study. Weber's theory of sources of legitimate power assist when comparing the legitimacy of competing groups or individuals: the Welsh Government and the Council, AWF and the 50+ forum, and their chairs John and Hillary. Use of Lukes' and Gaventa's theories of dimensions of power and quiescence help to address questions of how these organizations and individuals exhibit use of power. Finally, Foucault's theory supports consideration of whether, and if so the extent to which, older lay people's involvement with the Strategy has been "arranged to a convenient end".


## How achieved? - theories of organization and power


Whilst theories developed by Weber, Lukes, Gaventa and Foucault help understanding of power relations between players, they are less helpful when answering questions of why some lay people's involvement is limited or disallowed.

Gaventa's model of power and powerlessness presents a theory for how power, as a resource, can be developed and diminished, and can move from one group to another. The model suggests that a change in power balance can only be started as the result of an initial change in circumstances whereby a group with power makes a loss, or a group without power makes a gain (part of Lukes' "political agenda"). This enables the powerless to develop their resources for exercising power in any or all of its three dimensions whilst engaging in conflict with the powerful. At the same time, the powerful group can exercise its options for overcoming this conflict. The powerful group may overcome the conflict, but should they not; each success by the less powerful group reinforces its resources to engage in further conflict.

*Fig 20: Gaventa's model of power and powerlessness (Sadan 2004, 44 referring to Gaventa 1980).*

| Step 1 | Step 2 | Step 3 | Step 4 | Step 5 |
|--------|--------|--------|--------|--------|
|        |        |        |        |        |



B gains power

A loses power

Develop resources — Develop resources — Develop resources

Engage in conflict — Engage in conflict — Engage in conflict

Overcome: patronise, ignore, interfere, sabotage — Overcome — Overcome

B gains power

A loses power
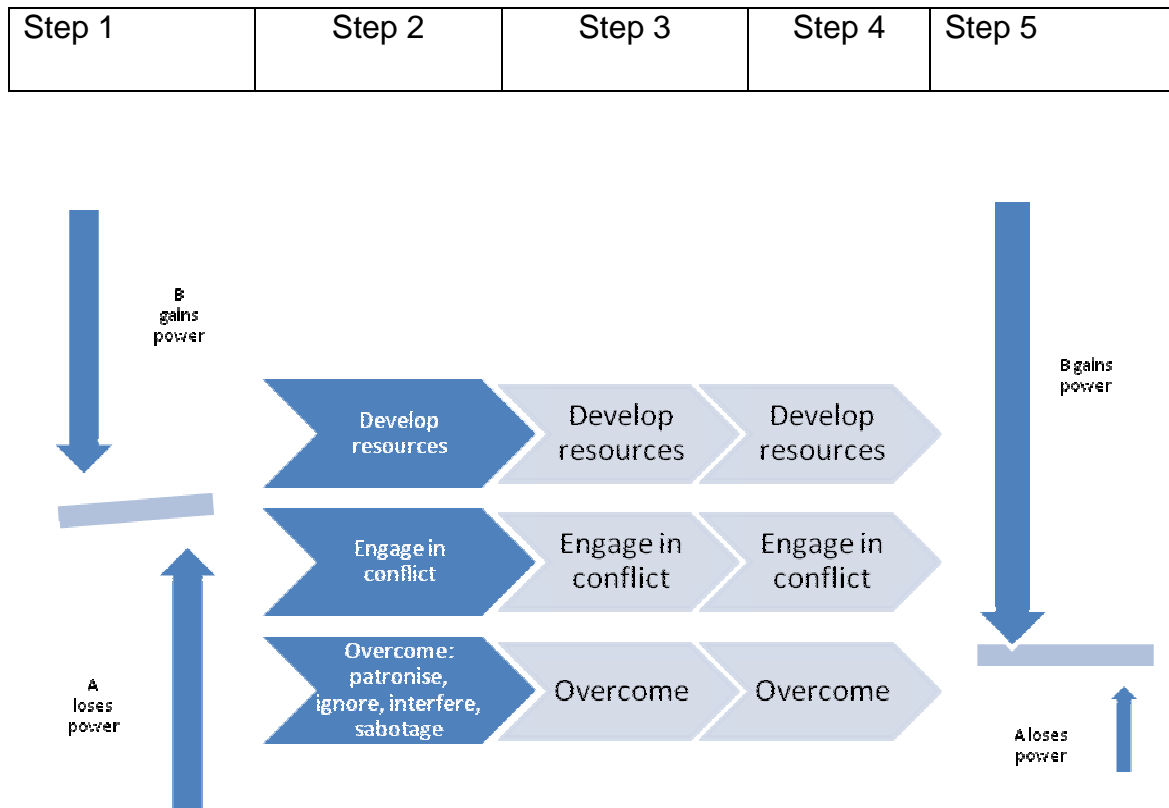
Mann sought to explain why the steps outlined by Gaventa may never be achieved. Mann suggested that those who occupy supervisory and coordinating positions, ie those who already have the power to command others to act, also hold organisational superiority as interaction and communication networks centre on them:

> "Though anyone can refuse to obey, opportunities are probably lacking for establishing alternative machinery for implementing their goals …… The few at the top can keep the masses at the bottom compliant, provided their control is institutionalized in the laws and the norms of the social group in which both operate."

(Mann 1986, 7)

It is this state which Mann describes as "organisational outflanking".

Mann goes on to differentiate between 2 types of power, authoritative power and diffused power.  Whilst authoritative power is based on definite commands and

conscious obedience, diffused power is the unconscious compliance of a population: "an understanding that these practices are natural or moral or result from self-evident common interest" (Mann 1986, 8). Those without power may be conscious of their situation; conscious that a meeting is taking place, or that others share their situation or even that others have successfully changed their situation. However, they may also be conscious of the price of engaging in conflict and this knowledge may be the cause of their decision not to engage. Mann suggests that, for some, there is an awareness that the longer they are outflanked, the greater the organisational resources of those in power and so the greater their strength. Whilst Gaventa argues that success by the less powerful group reinforces its resources to engage in further conflict, Mann argues that success by the more powerful group reinforces its resources to suppress conflict.

Unlike Mann, Gaventa and their predecessors, Giddens did not view power as a resource that could be held, developed or lost, but a social factor which influences and creates resources and social structures. His theory of Structuration or Duality of Structure views power as an important, if not exclusive, component of the social structure. Defining social systems as "regularised practices, reproduced across time and space", Giddens argued that power and action are intrinsically related and this relationship is itself a part of the social system. "All relations of autonomy and dependence are reciprocal: however wide the asymmetrical distribution of resources involved, all power relations express autonomy and dependence 'in both directions'. Only a person who is kept totally confined and controlled does not participate in the dialectic of control but such a person is then *no longer an agent.*" (Giddens 1982, 39)

Similarly, Clegg proposed that power should be analysed through the social relations which make up effective agency, where agency is defined as both people and collective forms of decision-making, ie organization:

> "The key to understanding resides in thinking of power as a phenomenon which can be grasped only relationally. It is not a thing nor is it something that people have in a proprietorial sense. They 'possess' power only in so far as they are relationally constituted as doing do"
>
> Clegg 1989, 207

Clegg proposed a framework comprising 3 circuits of power, each of which has its own rules, relations and resources.

*Fig 21:  based on Clegg's Circuits of Power, 1989*
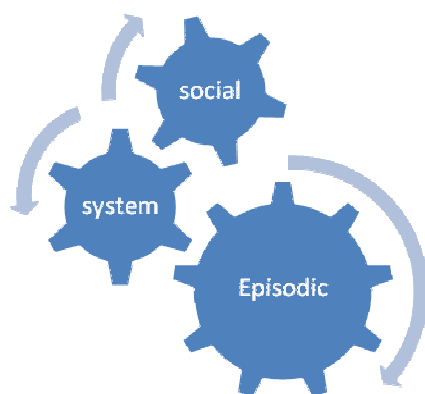


The possession of power may be fixed or regarded as a concrete thing only in so far as it is possible to fix the point at which episodic power passes into the social sphere (rules of membership, belonging or behaviour within society as a whole and within sections), or the system sphere (the material and non-material dimensions of society).  Securing outcomes (*A makes B do something which B would not have done otherwise*), may be achieved in the Episodic circuit, but Clegg argues that power involves securing or reproducing "the substantively rational conditions within which the strategies espoused in the circuit of episodic power make contextual good sense" (Clegg 1989, 212).

Clegg argued that power can only be understood relationally.  Episodic power is a "thing" which can be "possessed" only according to the relationship which the potential owner has with the social circuit or systemic circuit; the extent to which they are able to fix the points through which power passes.  Clegg argued that this will rarely occur without resistance of some kind, and although he concedes to the existence of Mann's "organisational outflanking", he believed this to be very rare. More common is the simple resistance to the exercise of power, resistance to the

fixing of points through which power passes, resistance to what has been described as substantively rational conditions. (Clegg 1989,207). Such resistance ultimately strengthens the stability of the more powerful, as its repeated attempts and failures to resist using the mechanisms offered through these rational conditions confirms the systemic-economic and social power of the other.

This research is concerned with co-production and collaboration, arenas which involve more than just 2 players. Earlier chapters describe the relationships between many organizations: the 50+ Forum and Council, but also AWF, the Welsh Government and the CVSC. The chapter on Networking refers to the theory of "boundary spanners", of individuals' whose role is to bring organizations together. Challenging this theory is Moore's theory of "damp-proofers". Based on mainly unpublished work carried out in Liverpool following the civil disturbances in the 1980's, the term "damp-proofer" was taken from a comment made by an older lay person to describe self-appointed community leaders who benefited from the investments being made by statutory organizations to develop the area, and who actively prevented such benefits from reaching others. Ultimately, grants became the means by which such individuals "get their living". (Moore 1995, 163). Similar to a building's damp proof course, these individuals formed an impenetrable barrier between statutory organizations and the community they claimed to represent. Moore suggests that this was known, by both the community and by those in positions of authority. Rather than those in overtly powerful positions following Clegg's model and resisting power being passed to the less powerful, in Moore's model power is absorbed by the "damp proofer", effectively reducing the power held by either of the others.

**<u>Findings</u>**

***Rational:  it's what the rules say – but who makes the rules?***

Much of the discussion at observed 50+ Forum meetings and during interviews indicated an acceptance of power based on what Weber would describe as rational sources of authority. In some aspects, adherence to rules, or demanding that others do so, gave significant power.  Hillary spoke of how the Forum Executive had "got rid of" John because he had not complied with the requirements of being a Chair, specifically through failing to present a balance sheet at the AGM.  Hillary also used this rational, rule-based, framework of the Forum constitution to introduce a subscription without referring the matter to ordinary members:

> *thank God there was a clause in the constitution that allowed us to go with it,*
> *for the Executive to set a subscription which hadn't been done before.  And*
> *when I saw that, I gave a sigh of relief, because really it should have gone to*
> *an AGM*

Unsurprisingly, given his long career in the police force, the former Development Officer, Mark showed a strong tendency to comply with rules and follow commands. His frustration with John, which ultimately led to the break-down in their relationship, seemed to stem from this.  As reported in the earlier chapter on Networks, Mark spoke at length about his role being to support and develop the 50+ Forum. However, he also spoke of it being funded by the Welsh Government through the Council who

> *sort of policed it, and made sure things were being done*

He went on to speak of a need to

> *tick those boxes and do what they say you should be doing with it (the*
> *funding)*

Mark felt that the Forum could challenge the Council, but only as long as it followed what he believed to be the "rules" set out for doing so.  When he returned to the

Development Officer post after a secondment, Mark expressed concern that John had become used to "getting his own way", and felt that he had authority to tell John what to do, in effect to "police" his actions. When interviewed, both Mark and John spoke of a Forum event held at a 4 star hotel, with lunch provided. John believed it gave an opportunity for Forum members to meet informally and give their views to influential people, including the local Welsh Assembly Member. Mark described it as "a jolly", a misuse of public money, and would have cancelled it if it had not been too late to do so. Mark's frustration with the Welsh Government for allowing John to continue his membership of AWF appeared to be based on his not understanding why it was allowed when both he and the Council senior manager had informed them that John had been breaking what Mark saw as "rules".

> *Yeah, one of the issues was that John, who was by then the ex-chair, was attending these meetings "thank you very much, all paid for". But not representing the Forum, and in fact, not supporting the Forum in any way. I know that because I had many meetings with (Welsh Government Civil Servant) and told him what was going on. And he chose not to do anything about it. So the Welsh Assembly Government, certainly he, knew that John was not representing the Forum anyhow, in fact he'd almost been thrown out. But he chose not to listen. And that came from (the Council Senior Manager), she had similar words with (Welsh Government civil servants) about this.*

However, as shown in Chapter 3, the Welsh Government did not set any rules for how local authorities should engage with and empower older people , and it welcomed what the first Ageing Strategy Manager described as "more innovative engagement mechanisms" and "going to where people are". John's organization of the hotel event was not necessarily breaking rules, but an alternative approach to putting rules into action.

There were many examples of rational, rule-based authority being claimed when such "rules" did not necessarily exist. Mark's employer, the CVSC, claimed rational, rule-based authority to support their decision to take control of the voting process at the Forum's AGM. The constitution did not require a secret ballot, and there had

never been one previously.   Interviews and comments made during Forum meetings where plans for the next AGM were discussed suggest that Forum members had no prior notice that CVSC officers were going to attend their AGM and tell them that they "had to have" a secret ballot.  However, this happened and Forum members did not challenge it, even though a number later expressed annoyance and even anger because of it.

There was a further example of the CVSC and Forum Executive presenting an action as the command of a more senior authority, when this was not accurate.   The decision to cut funding to the Forum, rather than making cuts elsewhere, had been made by the Council, not by the Welsh Government.  All local authorities received funding to use as they decided, and Hillary spoke of her awareness of other forums receiving "a big grant from the county council direct".  However, when Forum members spoke of this cut, generally they believed that it was carried out at the direction of the Welsh Government and that the Council had no choice.  The Forum newsletter, published in November 2011 when Hillary had become Chair and just before the Development Officer post ended, had a front page notice stating that the Welsh Government was ending funding for the Forum (Appendix 8– scanned copy of front page).  The newsletter suggested that the Council had no choice in the decision to cut funding for the Forum, and that this potentially unpopular act was entirely the responsibility of the Welsh Government.

Until this point, the local Welsh Government Assembly Member had been a personal member of the Forum and a number of Forum members spoke of her being very supportive.  Lucia , who had kept a scrapbook of newspaper-cuttings about her work with the Forum, showed many which included photographs with the Assembly Member.  Lucia drew attention to these and commented:

> *Yes, she came to see us quite a few times …… until Hillary offended her*

It was reported by some Forum members that the Assembly Member's membership and support ended following the publication of the newsletter.  John described how the newsletter had been published, and his view of the outcome:

> *The only newsletter they produced after I'd left, they said the Welsh*
> *Government had pulled their funding for the Forum.  And it wasn't the Welsh*

*Government, it was the bloody Council. The £47,300 went into the bloody Council the same as every other council in the country. And she (Hillary) said, on that newsletter that went out to a thousand people, it said it was the Welsh Government. Well, that goes to a thousand potential voters. It was very naughty, and I pointed out to Hillary, the mistake, and she didn't like it, she said "Oh no, it doesn't matter, it's just a grammatical error". And I said "Hillary".… but you know Hillary, she was a …. Didn't like it. " A mistake", and she said she'd print a retraction, but never has done. Well it was so good that the next time the Assembly Member went to meet with the CVSC, she stayed 4 minutes. (long pause)*

John spoke of the damage that this act, and the consequent lost link with the Assembly Member, had on the Forum:

*Now I've always got on very, very well with the Assembly Member, but, never asked her for anything, never asked her for a favour when she was AM or Minister. Always made her welcome at Forum meetings, always treated her with a certain amount of respect, and she always was there if we ever did need something desperately badly.*

*continues*

*….. and we've lost all these contacts. But if you're a lobby group. you can't be silly or they'll avoid you like the plague, but you've got the contact there*

As with the decision to take control of the Forum AGM, attributing responsibility to a higher authority not only provided the rationale for action being taken, it also deflected any negative response. This both served to maintain the positive relationship between the Forum and the CVSC and Council, and damage the relationship between the Forum and the higher authority of the Welsh Government.

Hillary's reliance or recourse to "rules" to give authority to her commands had some basis:  the written constitution did state that the Forum could introduce a subscription without consulting ordinary members, and the constitution required a financial report at an AGM.   However, there was no rational basis to support the Council, CVSC and

Development Officer's commands to operate only through formal meetings or claims that funding for the 50+ Forum had to be cut. They may have been based on traditional rules which no longer applied, and they were obeyed because many Forum members traditionally obeyed the rules or commands given by these organizations and individuals.

The Council and CVSC's requirement for people to engage only through formal structures had led to what Skidmore described as a "community elite …. Inhabited by the committed few" (2006, 49), resulting in Williams prediction of one half of current voluntary activity being excluded from the engagement process (2013,13). The imposition of (sometimes non-existent) rules and reliance on traditions by the Council and CVSC suggest a damaging lack of trust and flexibility comparable to that described by Entwistle, Williams & Sullivan and others.

The structure adopted by the Welsh Government, although less formal, was not completely different from this. Both relied on traditional structures and the strong hierarchical leadership which Callender suggests is necessary for successful partnership working. As with the 50+ Forum, in AWF it was easy to identify power allocated according to what Weber would describe as rational and traditional grounds. Although AWF meetings were generally less formal than the 50+ Forum, it had not completely abandoned traditional ways of working, with its associated rules and regulations. John may not have been addressed as "Chairman" during discussions, and the paperwork may have been less detailed, but AWF still had meetings with agenda and minutes, and those present still deferred to John during discussions.

### Traditional: this is the way we've always done it

The 50+ Forum represents a traditional model of engagement: regular meetings of members led by an executive group of officers – Chair, Vice Chair, Secretary, Treasurer and so forth. This study has not sought to establish why the Council decided to develop and support this model rather than the less traditional models adopted by some other councils. However, it should be noted that whilst this model

might be viewed as traditional, it is by no means the most formal model chosen by a local authority.  The Welsh Government itself has supported a similar model for AWF, which has Regional Chairs who take turns to chair national meetings.

This traditional model brings demands which many people in the 50+ Forum found unfair or unreasonable.  There were frequent comments about the Council expecting responses to letters or attendance at meetings which gave no consideration to people's personal circumstances, with a common cry of:

> *they're paid to do it, we're volunteers*

This was given as a reason for attendance at 50+ Forum meetings dropping many years before any subscription was introduced, summed up by Deborah as:

> *they were expecting too much of people*

However, this formality appeared to be expected and even welcomed by some members of the Forum.  Elaine spoke of the model giving people opportunities to take on different roles according to their personal strengths and choices, but with the contribution of everyone being valued:

> *We've got people who like to do this, and people who like to do that, and people who like to do this.  And we've got a strong chair, (laugh) oh yes, and we've got a strong deputy who's happy to be a deputy.  Because in the world of work you've got a chair and you've got a deputy who can't wait to get in.  But we …. We're done with careers and stuff, and she's happy to support Hillary.  She doesn't want to be chair, but she's happy to support Hillary.  And we have the Hostess Officer .  We're now saying we have a secretary, a chair, a deputy, and treasurer, and we now have a Hostess Officer.*

The members of the Forum who had many years' experience of committee-type work through their earlier careers, notably Hillary, Alice, Jennifer, Janet and Liz, made repeated references to the Forum needing to be seen to be what they called "professional".  Hillary made direct reference to this when interviewed:

> *You've got to be professional to get things done and people realise that. You've seen, I take it, our agendas and meetings. We try to do things professionally.*

Although they knew each other very well, and although it is a practice which is becoming less and less common, this group also used formal forms of address during meetings, always addressing Hillary as "Madam Chairman".

Not everyone shared this view. Some felt that holding on to traditional ways of working resulted in a minority retaining power and others being excluded. May, who had decided not to be a member of the Forum executive, spoke of more experienced members being patronising. Janet, who was extremely experienced and appeared very confident, expressed concern that others were not being encouraged to develop skills so that they could participate equally with more experienced members.

Lucia expressed her opposing view most strongly. Lucia believed that it was important to be professional, even though one may not be being paid. Examples of this were her displaying in her home the certificates of her counseling qualifications which she had obtained through her voluntary work, and her referring to fellow volunteers as "colleagues". Observations and comments made when interviewed also suggest that Lucia did not lack the confidence to speak and act in formal, traditional work settings. However, Lucia challenged the assumption that "professionalism" equated with a specific model of working. Lucia's attitude ranged from feeling bored and so not engaged by traditional models:

> *But ask me to do a big report, writing things …. It bores me. If I have to do it, I do it, but it doesn't appeal to me. I'd rather talk to you, face to face.*

to expressing strong views that traditional models achieve little and waste both time and money:

> *at one of the Council meetings about the Health and Social thing. And the chap that done, the chairman, he's not there anymore. He said there was a model he was doing that had taken 3 years, 'twas 300 pages I think, and I said "Who's going to read that?" You know. No one's going to read that. It's a waste of time and money. That's where the money is wasted, actually.*

*Cause instead of doing all these reports, just get up and do something. Because that's the paperwork, not going to make any difference. Some places, yes, it's needed, I know. But a lot of it could be shortened down.*

Lucia compared this manager's approach with that of the newly appointed Council Chief Executive , a woman in her early 50's, whom Lucia described as:

*Very outgoing person, very social. Once you start talking, you think you've known her for ever. And I suppose that's what we need here, instead of all those stuffed shirts. (Laugh) Those people annoy me.*

Lucia appeared frustrated, both with Hillary whom she described as "a bit old fashioned", and with senior officers in the Council, believing that their insistence on retaining traditional practices and language did not just exclude people. It was damaging as it slowed down decision-making, wasted resources and prevented necessary action from taking place.

A conundrum presents itself when considering the influence of traditional forms of authority in the delivery of the Older People's Strategy. Some of the most active and dedicated members of the Forum obeyed the commands of those in traditional positions of power, illustrated by their joining a host of consultation and planning groups and of operating within the formal committee/forum structure prescribed them, adopting the forms and traditions associated with this style of working. A number of these very active, dedicated and often vocal members, such as Alice, Jennifer and Liz, shared Lucia's feeling that little was being achieved through this way of working. Alice believed that the Council organised meetings so that they could say:

*'oh we have x, y and z. We have meetings once a quarter for whatever', but whether anything really came of them, I don't really know*

Liz spoke of similar experiences with the CHC:

*We're drawing things to their attention, but they ain't doing anything about it*

However they continued their involvement.  Unlike Lucia, they never questioned this way of working, they continued with it because it was the way things had always been done.

### The charismatic leader

Both John and Hillary could be described as charismatic leaders, with a group of people who followed them and acted as they directed.  John's authority had little traditional or rational basis; he adopted non-traditional, informal approaches to engagement and the AWF regional meetings he chaired had none of the traditional trappings of the 50+ Forum meetings.  However he was also able to give a detailed description of how, as Forum Chair, he had obtained discounts and sponsorship for social events, emphasizing that he was aware of the rules in this area and followed them closely.  At observed AWF regional and national events, it was clear that John had an open, friendly relationship with civil servants and other AWF members.  He easily held the attention of the room, making inspirational contributions to discussions.

Hillary had a traditional and a rational basis for claiming authority, but was willing to move away from these if she felt it necessary to achieve her aim.   For example, John claimed that the 50+ Forum had a rule that no one could become a member of the Executive Committee until they had served a year as an Associate.  Hillary had not been an Associate before joining the Executive Committee as Chair, and it was not clear whether she had actually been elected to the position or simply volunteered herself for it. Although Lucia commented on Hillary being "put there" by the CVSC, many others expressed gratitude that Hillary had taken on the role of Chair and steered the Forum through the difficult period of losing its funding.  Elaine expressed this as follows:

> *But you see, a lot of people have lost faith I suppose because we lost Mark and they thought you can't carry on without Mark (laugh).  Oh yes we can! Particularly with Hillary at the helm.  She does keep things going.*

Some other officer positions also appeared to have been appointed by Hillary rather than nominated and elected by members. The Treasurer said that she took up the position because "Hillary asked me if I would do it". Another Forum member spoke of the Secretary "appearing from nowhere" and being appointed by Hillary. However, the majority of Forum members admired Hillary and were happy to accept her leadership regardless of this. Although in most other ways they valued authority based on tradition and on rules, Hillary's break from these was accepted. For some this was due to positive experiences of Hillary's leadership and past achievements, for example Alice and Jennifer spoke with real affection and admiration of Hillary's dedication when establishing the CVSC over 20 years ago:

> *Alice: We got involved in getting the CVSC off the ground, Hillary got us involved in some meetings …… upstairs in the library ……… getting nowhere. Hillary said "I'm going to lock this door and I'm not going to open it until we've come to a decision!"*
>
> *Jennifer: Bless her heart, she's worked very hard*
>
> *Alice: Certainly the building was entirely due to her enthusiasm*
>
> *Jennifer: We wanted it called "Ty Hillary" (Hillary's House)*
>
> *(Laughter)*

There was much evidence of people simply liking Hillary, and so willingly forgiving less palatable aspects of her leadership. Although the CVSC may have drawn on traditional and rational reasons for taking control of the 50+ forum AGM, it seems unlikely that they would have been successful if they did not also have the charismatic influence of Hillary, who both challenged John and provided an alternative to him.

### One, two, three faced?

The workings of the 50+ Forum and AWF, combined with those of the Council and

CVSC, illustrate examples of Dahl's concepts of overt power. Also illustrated are examples of Bachrach and Baratz's concept of covert power, of older people not being given the opportunity to make decisions, possibly through their not having the required skills, energy or financial resources. Finally, they provide examples of what Lukes describes as latent power, and of Gaventa's phenomenon of quiescence. The lack of funding for informal methods of working or even administrative support, the CVSC's taking control of an AGM and the continued involvement in partnership groups or engagement activities which achieved very little if anything can all be viewed as examples of older people silently agreeing to conditions of glaring inequality. This was also the case when the Council proposed merging the roles of Development Officer and Coordinator. Only the former Development Officer had "heated discussions" about the proposal and stated that it wouldn't work because the Development Officer role needed to be independent of the Council; everyone else accepted it. Only John objected when the Council entered into an agreement with the CVSC on use of funds, rather than giving control to the Forum.  However this was not all "done to" lay older people and "done by" large, established organizations. Much of it was done with the active support and cooperation of members of the Forum, particularly the most assertive, most skilled members of the Executive. It is an example of the upwards and downwards continuity described by Foucault, of individuals governing themselves in accordance with an overarching power in order to govern those around (or below) them.

What Foucault's theory doesn't address is the relationship with the Welsh Government. Whilst there might have been upward continuity with the overarching power of Council, there was a break between the Council and the Welsh Government. Furthermore, the actions of the Council hindered opportunities for a link to be formed directly between the Forum and the Welsh Government. Actions such as the Council allowing it to be suggested that the Welsh Government was responsible for the unpopular decision to cut funding, and trying to prevent funds being used for informal events which brought together Assembly Members, MPs and Forum members on the basis these broke non-existent Welsh Government "rules", damaged existing links and prevented further links being made. The actions resulted in an increase in the overarching power of the Council and the individual power of Hillary to govern remaining Forum members and exclude members (notably John)

who challenged the authority of the Council.  The action of the Council is an example of organizations or individuals deliberately breaking with an overarching power, only to establish themselves as a new, overarching power.  Foucault argued government "is the right disposition of things, arranged so as to lead to a convenient end" (Foucault 1996, 16).  However the "end" which the Welsh Government was proposing may not have been "convenient" for the Council.


### *Organization and power – getting things done*

The reported experiences of the 50+ Forum followed the sequence described by Gaventa  of developing resources and engaging in conflict (at least, engaging with organizations which hold power), occasionally being successful and consequently developing further resources but usually being overcome and consequently losing power. Sometimes they were overcome by being patronised, for example through being invited to join groups although their contribution was never acted upon, or being told that they have to attend a training course but that they will "receive a certificate" that they can record on their cv.  Sometimes they were overcome by being ignored, as was the case with Deborah and Sharon when the Programme Group was disbanded and they were not informed.  Sometimes they may even have been overcome by sabotage.  Deborah and Sharon spoke of their personal distress at the sudden ending of the Programme Group, suspecting that this may have been partly because they had become too successful at challenging people and highlighting the shortcomings of paid professionals.  They were not alone in believing this.  The former Development Officer, who in many respects identified closely with the CVSC and Council, questioned why the meetings had stopped:

> *But they sort of dried …. I don't know why it dried up.  This was before the money had dried up.  If I was ….. I don't know, it's like UFO's …. It's a bit like, a bit like, conspiracy theories.  A bit of me would say "was the forum too successful, did they cause too much trouble?".  Because it's odd, the money being cut, jobs being cut, meetings stopped being held, sort of, stop it all happening.*

The sudden stopping of the Programme Group meetings was discussed in interviews and observed Forum meetings.  Forum members, including Hillary, reported trying to make contact with the relevant Council senior manager to find out when or whether meetings would restart, but no response was received.  Alice spoke about seeing the manager in the main Council building and going to approach her, but she moved away.  Alice had joked

*I think she's frightened of me*

The manager may or may not have been frightened of Alice, but ultimately the Council's control was institutionalized in the laws and norms in which the Forum operated.  As Mann would describe it, the Forum as an organization had been outflanked.

The actions of the 50+ Forum under John's leadership could also be viewed as an example of Gaventa's model of power and powerlessness; the Forum took control of its finances and operated in an informal way which challenged the CVSC and Council's rules and traditions.  John described this as:

*We're big boys and girls, we should be doing it ourselves, perhaps with some guidance.*

The CVSC's action to take control of the Forum AGM could be viewed as an example of Mann's theory of organisational outflanking.  Authoritative power was used in the CVSC's officers' attending and taking control of the meeting, directing how elections were to proceed.  Diffused power was evident in the unconscious compliance of the Forum members, including those who afterwards complained and said that the meeting was a shambles.  The active part in these proceedings played by Forum members who were also Trustees of the CVSC or who had strong links with it, could also be viewed as diffused power.  At the time, Forum members accepted that what was happening was "natural" and did not challenge it.

The period over which data were collected provided many more examples of organisational outflanking, some less successful than others.  Whilst the Council and CVSC may have outflanked John by taking action which led to him leaving the

Forum, they were not successful in their attempts to remove him from AWF. The CVSC employed former Development Officer and the Council senior manager made representations to the Welsh Government, and Hillary drew on her own personal networks with civil servants and her established reputation. Although the Forum eventually secured a position on AWF, John's place and voting right was reinforced by the change in constitution. By espousing the same laws and norms as the Welsh Government, notably a belief that Forums should work informally in order to engage with older people who are less confident, less skilled or with fewer advantages, John outflanked the Council and CVSC.

If considered within Clegg's Circuits of Power, the traditions and rules espoused by the Council and CVSC provide the rational conditions which prevented power passing from the episodic circuit to the social circuit; the Forum was prevented from engaging with and empowering older people through informal, social methods of working. Although these traditions and rules did not prevent power from being passed to the system circuit, the demands of these traditions and rules effectively limited the number and the character of the older people who would benefit from holding such power. The resistance to power passing to the social circuit , and the repeated attempts and failures by John and his supporters, strengthened the stability of the more powerful – the Council, the CVSC, and the members of the Forum who were suitably skilled and experienced, and who were closely associated with the Council and CVSC themselves.

Conversely, the Council's resistance to the Welsh Government's rational conditions, that is the Welsh Government's support for informal methods of engagement, resulted in the Council being excluded from the Welsh Government based social circuit and system circuit of power. Not only did it not prevent John from continuing as a member of AWF, its ability to achieve outcomes was damaged by weakening its social and system link with John, who was now one of the area's representatives on AWF, the regional representative on the NPF and consequently linked with senior civil servants, the Welsh Government Minister and the Commissioner for Older People.

**Contradictions**

This research hasn't sought to establish the reason for Welsh Government or Council actions, only to consider the effect these have on older people's ability to be involved in the decisions which affect their daily lives.  However, some actions together present contradictions which require further discussion.   As with the contradictions identified in the earlier chapter on Legitimacy, these contradictions question the balance of power within collaborations, the influence this has on the rules of engagement adopted and the influence on older people's ability to participate in the decision-making process.

*Following the rules and traditions – some of the time*

As previously outlined, it could be concluded that members of the Forum took specific actions because they believed that there were rules commanding them to do so.  They held formal meetings, they did not spend money on meals or refreshments, they held a secret ballot at their AGM and they accepted the loss of funding and consequent office space and administrative support.  However, these Forum members did not challenge the Council or CVSC when they acted in a way which broke these rules and there were many examples of these supposed rules being broken.  The Council had adopted an informal and supportive approach in its planning of the inaugural meeting of the 50+ Forum.  Deborah provided paperwork from this first event:  it was titled "Nothing decided about us without us", was advertised widely and practical steps were taken to encourage people to participate, including provision of refreshments.  Many members of the Forum had attended other meetings with statutory bodies, including the Council, where there had been informal networking sessions and focus groups, and they had been provided with a drink or a meal.  No secret ballot was held at the 2 AGM's which followed the meeting where the CVSC had intervened, even though there were representatives of the CVSC and Council present.  Hillary appeared acutely aware that there was no rule to prevent the Council giving funds to the Forum, accepting the offered "pot of

money" even before clarification was given on what it was for, and assuring Alice that "they won't want it back".

As with the conundrum of Forum members continuing to participate in co-production, collaborative meetings which led to no successful outcome, some Forum members continued to follow what they believed to be "rules" despite these contradictions and even though the outcome was unsuccessful. According to the documentation provided by Deborah, 44 people attended the inaugural meeting of the Forum, and 14 nominated themselves for a Steering group to develop a county wide 50+ Forum. However, Deborah said that only 8 people turned up for the first meeting. When asked why, Sharon said that she felt it was because people were interested in a social group rather than a lobbying group. If the aim was to engage with older people, the move from an informal gathering to a more formal Steering Group was evidently detrimental. Nonetheless, Deborah, Sharon and others continued their efforts to establish this formal mechanism for engagement, and the Council and CVSC continued to suggest that this was the mechanism that had to be used.

In some ways the speed with which AWF introduced rules and then amended them pose greater contradictions than those exhibited by the 50+ Forum. John's boast that AWF had established a constitution in a very short period of time suggests a strong connection to rules and traditions. It contradicts his statement that AWF is not a committee, but a "group of people" and the first Welsh Government Ageing Strategy Manager's comments about "trying to encourage more innovative engagement mechanisms, and … 'going to where people are'". John's description of how "they immediately changed the constitution" when his membership of AWF was challenged by the former Development Officer and Council suggests an ability to introduce and change rules rapidly in order to maintain a chosen position. As well as protecting the position of John, as a Welsh Government favoured member of AWF, these rapidly changing constitutional arrangements show very little trust in older people's ability to choose appropriate members of AWF. They allowed no flexibility for older people to make changes to the people who are supposed to be representing them, should they wish to do so.

***You don't have to be special to join, but you can't join if you're not***

A significant difference between the workings of the 50+ Forum and AWF arose from the practical support provided by the Welsh Government to AWF. This included funding for secretarial support so individual older people were not burdened with this, and meals and refreshments at meetings. Welsh Government officials were observed strongly encouraging members to claim both travel and subsistence costs for attending meetings. This support allowed individual members, notably John, to become what Callender described as "local service entrepreneurs", taking the lead within their own organizations. In her role as Chair of the 50+ Forum, Hillary made use of networks which she had developed throughout almost 50 years of working within the voluntary and statutory sectors at a local and national level. It was because of the breadth and longevity of her networks, and the reputation and trust that these were founded on, that she could claim that she "happened to bump into the Minister the other day" when she was seeking to secure a place for the 50+ Forum on AWF. Becoming a member of AWF gave John an opportunity to broaden his networks, but the practical support also gave an opportunity for him to nurture what convoy theory would describe as third-circle relationships into second-circle relationships, resulting in his comment:

> *I'll be meeting up with Sarah, the (Older People's) Commissioner, for a coffee soon and …*

The act of "meeting up for coffee" suggests a level of trust and flexibility which is not offered in a formal meeting. "Meeting up for coffee" doesn't require a pre-defined agenda, recorded proceedings or agreed minutes. The practical support allowed John to build trust and reputation as resources to counter the challenges which the Council and CVSC made to his membership of AWF.

This could be viewed as a deliberate attempt on the part of the Welsh Government not to limit the involvement of older people in decision-making by using traditional or rational forms of power, not to exploit people's unquestioning acceptance of glaring inequalities and not to outflank them through patronising them, sabotaging their efforts or overwhelming them with administrative or travel demands. However this

view is contradicted by the fact that John was only able to take on this role because he was already a member of AWF. As has been discussed in earlier chapters, the process for securing membership of AWF was not straightforward, and was more dependent on networks with and appointment by those in positions of power than it was on appointment by other older people. John was not closely associated with the Council or CVSC, but he had built up strong, second-circle, relationships with members of AWF, the NPF and the Welsh Government. His place on AWF and the NPF was due to his having been able to build these networks, which is as much a skill as being able to function within a formal meeting setting.

Deborah and Sharon were not closely associated with either the Council and CVSC or AWF, the NPF and the Welsh Government, and they did not build up second-circle relationships with members of the collaborative groups that they joined. The formal way in which Council led meetings had been organised would have hindered the development of such relationships, but the situation is more complex than a simple use of traditional and rational forms of power to limit older people's involvement in decision-making. Although it may be more difficult, some people can and do develop second-circle relationships from formal third-circle relationships, without deliberate support structures being provided. Also, they could have developed these types of relationships if they had joined the less formal AWF. In observed 50+ Forum meetings, Sharon and Deborah were repeatedly asked by other members of the Forum, including those who were strongly associated with the Council and CVSC, to become more active and represent the Forum at various events, but they declined. Due to his strong allegiance to the Council and CVSC, the former development officer Mark may have given greater encouragement to their joining Council led groups than national groups, and once John had joined the 50+ Forum he may have taken firm steps to secure his place on national groups including AWF to the exclusion of others. However, Deborah and Sharon had an opportunity before John arrived, and they did not take it up. When interviewed, Mark spoke of how Sharon "didn't want to be chair", and how Deborah had agreed to become Chair:

> Reluctantly, she didn't want to do it, but she didn't want to see the Forum fall, so she said she would do it.

Deborah and Sharon spoke of previous negative experience with collaborative groups and lack of trust in the process, and of not having had previous experience of committee work. Although their technical skills may have been very good, they may not have had the self confidence or personal toughness which these roles demanded, and this excluded them from AWF meetings as much as it excluded them from Council led meetings. The Welsh Government may have provided practical support, but making a journey of over 100 miles or visiting a previously unknown place and mixing with unknown people, regardless of how welcoming they may be, requires stamina, skills and self confidence which John clearly had, but which Deborah and Sharon may not.

Although the Welsh Government provided practical support so that people without formal committee skills could participate in decision-making, this support was only provided to people who had a level of personal resources which are not always common.

### Contradictions and cliques

These two areas of contradictions, concerning use of rational and traditional forms of power and of demanding specific skills, were closely associated with the operation of cliques.

The quiescent support for the Council and CVSC by a dominant group within the Forum executive can be compared with Addicott and Ferlie's dominant sub-group of medical professionals within Managed Clinical Networks. The group was characterized by strong links with the CVSC and the Council , identified as the Council/CVSC/Health Board clique in the earlier chapter on Networks. As with the dominant group of medical professionals described by Addicott and Ferlie, this group was a clique that had been established for decades. As with Addicott and Ferlie, this group assumed positions of power (Chair, Secretary, Treasurer). In particular, they drew on the prestige of Hillary's reputation, past achievements and external networks. A major difference between the 50+ Forum and Addicott and Ferlie's example is that not all members of this dominant group were present when the

Forum was established; they joined and became dominant only when John challenged the power of the Council and CVSC. Whilst Skidmore refers to a community elite developing as a result of a requirement to engage only through formal structures, this is an example of a community elite being introduced and then using traditional and rational sources of power to demand engagement through formal structures in order to counter challenges to its authority. However, this community elite, or clique, was then responsible for the contradictory behaviour of not maintaining this requirement in its entirety once the challenge had been removed.

Despite the Welsh Government's investment and support of informal ways of working, the decision to change the AWF constitution as a result of John having "mentioned it (ie the 50+ Forum challenge) to Cardiff" is an example of the AWF/NPF/Welsh Government clique contradicting its previous relationship with traditional and rational sources of power in a way similar to that displayed by the Council/CVSC/Health Board clique. The speed and determination with which the constitution was changed when John's place on AWF was challenged suggests a strong willingness and ability to revert to the use of traditional and rational sources of power when challenged.

Although they adopted different mechanisms and structures, both the Council and Welsh Government changed their rules and traditions according to their own need, using authoritative, diffuse and latent forms of power in order to "get things done". As noted earlier, this was not all "done to" lay older people and "done by" large, established organizations. Much of it was done with the active support and cooperation of members of the 50+ Forum and AWF. Hillary willingly attended the 50+ Forum and challenged John's membership, and John willingly accepted the advice of the Welsh Government to develop the AWF constitution in a way that ensured existing members could not be removed, thus limiting older people's opportunities to appoint anyone who did not already have an established relationship with the Welsh Government.

It is clear that both the Welsh Government and Council made use of the charismatic power of specific individuals in order to achieve wider aims; namely that of Hillary and John. As already noted, although the CVSC may have drawn on traditional and

rational reasons for taking control of the 50+ Forum AGM, it seems unlikely that they would have been successful if they did not also have the charismatic influence of Hillary, who both challenged John and provided an alternative to him.  Similarly, the Welsh Government advised invitation and appointment of John to the NPF and their advised changes to the AWF constitution suggests that the Welsh Government placed great value on John's contribution and was unwilling to risk his being removed from AWF.  Both John and Hillary were very intelligent people, and it would be disingenuous to suggest that they were being manipulated by these powerful, established organizations.  They may have received some personal benefits, in terms of raised reputation and public profile, increased second and third-circle networks or personal satisfaction with a job well done, but nothing that could be viewed as against the public interest or corrupt.  They both contributed a great deal of personal time and effort, and interviews and observations indicated that they were both strongly motivated to act to promote the interests of other older people.  As both the Welsh Government and Council claimed to have the same aim of empowering older people and both displayed the same contradictions, it is difficult to identify why Hillary chose to become associated with the Council and John chose to become associated with the Welsh Government.   Their actions could be viewed as an example of Foucault's upwards and downwards continuity.  Both the Welsh Government and Council expressed similar contradictions in their actions: alternating between using and ignoring rules and traditions, overtly indicating that special skills are not required but taking covert or latent action which resulted in specific skills being essential.  Hillary and John may have ignored or accepted this contradicting behaviour, simply because it led to a convenient outcome for their particular clique.


**Boundary spanning or boundary setting?**


Consideration of clique membership also adds to the understanding of the role and power of boundary spanners, both employed and otherwise.  Many of the people involved with the 50+ Forum and AWF displayed the skills and attributes associated with this role; they were not only held by the employed Development Officer.

As with any role, employment brings allegiance to the employing or funding body; in this case the CVSC and consequently the Council. The former Development Officer, Mark, made various statements which suggested that he also had an allegiance to the Welsh Government, making reference to the Welsh Government providing funding and a consequent requirement to follow Welsh Government "rules" (sic). However, he had limited opportunities to develop his networks with the Welsh Government/AWF/NPF clique and so his understanding of these rules was determined by the CVSC and Council. This might explain his frequent reference to "rules" which did not exist, his description of an informal consultation event as a "jolly" and his failure to understand why the Welsh Government continued to support John's membership of AWF. This was a temporary, part-time role and it is possible that if the role had been better resourced, the holder would have had more opportunity to gain an understanding of Welsh Government requirements rather than simply receiving directions from an intermediary. However, many posts of this type are poorly resourced, part-time and temporary.

The AGM where the CVSC intervened was not attended by the former Development Officer. The reason for this is not known, but as an employee it would have been difficult for him to challenge this action even if he had attended. His employment prevented, or at least hindered, his ability to take on the function of reticulist or entrepreneur which Williams identifies as being essential parts of the Boundary Spanner role. The former development officer's allegiance to the CVSC and Council also led to him actively discouraging some reticulist or entrepreneurial activities of others. Rather than spanning boundaries and bringing people together, some of his actions, such as his making representations to the Welsh Government concerning John, suggest characteristics similar to Moore's "damp proofer". Although not appointed by older people, his assumed legitimacy was unchallenged by the Council, the CVSC and the wider community who believed that the Forum had ceased to exist when his post ended. When this legitimacy was challenged, or at least ignored, by the Welsh Government, this evidently caused irritation. Although the level of self gain that the former development officer received through being in an employed position cannot be compared with the level of self gain received by the self-appointed community leaders in Moore's study, there was self gain and it did result in power being absorbed rather than filtering through to older people, resulting in the

viability of the Forum being questioned when his post ended. As noted in Chapter 5, the former Development Officer was most valued by Forum members for his administrative skills. Earlier chapters also make reference to Forum members feeling discouraged and over-burdened because of a lack of practical, administrative support. These findings suggest that using limited resources for the employment of a boundary spanner role has various benefits for powerful, employing organizations. However, the findings question investment in this role, when the required skills are already held by many older people. Such roles may limit rather than enhance people's ability to participate in the decision-making process, particularly if such participation challenges the established power.

John also exhibited many of the characteristics required of a boundary spanner, whilst also exhibiting the characteristics of a damp proofer. He put great effort into establishing links between older people and national bodies, such as through inviting the AM and MP to 50+ Forum events. He also gave this as his reason for his own membership of AWF and the NPF. However, as discussed in earlier chapters, his legitimacy to represent older people arose mainly from his being selected and supported by the Welsh Government, not by older people. Notably, Sharon repeatedly expressed anger that John was attending AWF meetings without a mandate from the Forum, and claimed that even when he was Forum Chair he had never given a report to the Forum on AWF proceedings. However, at the time that data collection ended, the AWF regional group under John's leadership was growing, with more and more older people attending events, alongside people in positions of authority such as the Commissioner and Assembly Members. Consequently it cannot be judged whether John was absorbing power for himself, or acting as a bridge between older people and decision makers. Whichever, his success will be due to his skill in building networks, establishing his place and receiving protection from the AWF/NPF/Welsh Government clique.

Chapter 6 identified Hillary as the only person to have links with both the Council/CVSC/Health Board clique and the AWF/NPF/Welsh Government clique (although not a personal member of AWF, Hillary had long-established ties with members of AWF other than John). Hillary may not have been successful in removing John from AWF completely, but she was successful in securing a place on

AWF, and a vote, for the 50+ Forum.  Hillary drew on her long-established networks with the Welsh Government, such as through knowing which civil servant to speak to and "bump(ing) into the Minister".  Although it is unclear why Hillary chose to align herself with the CVSC/Council/health board clique, effectively opposing John, she possibly achieved more as a boundary spanner than the former Development Officer could ever have achieved.  However, regardless of these achievements, her insistence on formal ways of working formed a barrier, preventing others from sharing in the power that she had gained.  Hillary appeared conscious of this, frequently referring to her own professionalism and commenting:

> *I mean, you can't pluck someone of 50 off the street and say "become involved" because they have no idea of what they are committing themselves to do, to read, to come to meetings, to think about things.  And that's not a common characteristic of people.*

Hillary probably would not disagree with a suggestion that she formed a barrier, only that this barrier was detrimental to older people's ability to be involved in the decision-making process.


## Co-production:  is it about getting onto the bridge, or is it about finding the bridge?

This research has not questioned why the Welsh Government has sought to adopt one approach to engaging with older people and the Council has adopted another.  Also, it hasn't questioned why the Welsh Government allowed and encouraged local authorities to decide for themselves how to engage with older people, and then established a national structure (AWF and the NPF) which could be seen to compete with or duplicate the structures established by local authorities.  These questions have not been asked because older people are generally not in a position to ask them.  Older people wishing to be involved in decisions that affect their daily lives, older people wishing to have their voice heard by public services, are required to start and then work with the structures and mechanisms which are already there.

### Excluded by networks more than by mechanisms

Unlike Loffler and Bovaird's concerns of more assertive users benefiting most from their relationship with the state, these findings add weight to those of Chapter 6 that benefits arise from established network membership and motivation to develop further networks. This research found that membership of structures or mechanisms developed to give a voice to older people, regardless of how informal, is dependent on networks and networking skills – being able to develop relationships, extend networks, build alliances and join cliques.

Whilst more important than traditional meeting skills, these skills are also less tangible. If someone has no previous experience of needing networking skills in order to live their lives, and if they have no existing motivation to develop their networks, it is unlikely that they would do so in order to engage with, protect or strengthen their position within a structure or mechanism which is otherwise alien to them. This goes some way towards further resolving the question of why men were so under-represented in mechanisms established to engage older people with the Strategy. Certainly the majority of men involved in this research, all of whom could be described as being involved in some form of below the radar voluntary activity, appeared content with the networks which they had established, partly through family ties and partly through using their free bus passes and community facilities.

### The importance of clique identity

Whilst a lack of motivation to develop networks and join cliques may be one reason for men's under-representation, the elected silence of clique members who could be described as "minorities within minorities" appeared linked with the projected identity of the clique.

Members of the 50+ Forum identified themselves as "professional", which was equated with very traditional methods of working that had been used by leading members during their earlier professional careers. Motivation to retain professional identity had led to what Foucault describes as downward continuity, with some lay

older people reinforcing or even creating a requirement to observe traditional forms of working in order to maintain their "professional" image, but effectively becoming what Moore would describe as a "damp proofer" in the process. During their careers, Lucia and Jennifer had successfully overcome the barriers that precluded them from this identity. Lucia moved to the UK at the end of the Second World War as the relation of a prisoner of war, but went on to establish a successful business. Jennifer had established a successful career as a physiotherapist, leading to an independent life. They were both active in supporting others who were Italian/blind, and Lucia was open and clearly very proud of her Italian heritage. However, the characteristics they shared with others in the 50+ Forum clique were those of being professional, reasonably affluent, articulate and confident. Possibly they felt that these characteristics distanced them from minority communities of older people and so made them unsuitable representatives of them at the 50+ Forum. However, this experience may also explain why Jennifer drew little attention to her need for assistance and Lucia decided to become involved with AWF rather than continually challenging the working practices of the Forum. It may also explain why those who could claim a strong Welsh identity, including Hillary herself, rarely did so. Drawing attention to these characteristics may undermine clique membership.

### *Cliques protecting their members*

Membership of a clique brought benefits of being recognised as the legitimate representative of older people, of being trusted and so being given some financial support in order to function, and of being protected from challenges by others. For clique members who took on the role of boundary spanner, membership also gave the power to act as a damp proofer. Unlike Moore's research, where "damp proofers" drew on sources of power outside those of the statutory bodies in the collaboration, both John and Hillary were able to perform this role because of the power secured through clique membership.

A major benefit of being a member of a clique appeared to be the protection offered to individuals by more powerful clique members. For example, John was able to outflank attempts to remove him from AWF because of his membership of the AWF/NPF/Welsh Government clique. The AWF constitution was changed in order to

protect John's position, at least in John's view, and it was this continued membership that protected his claim of legitimacy to speak for other older people.  The actions and motivations of Sharon and Deborah were as "desirable, proper, or appropriate" (Suchman 1995,574) as those of John and of Hillary, but they were not members of a clique.  They may not have had the required skills, they certainly did not appear to have the motivation to develop their networks, but it was these networks which enabled John to continue to have a voice after he left the 50+ Forum whilst Sharon and Deborah were effectively silenced when the Programme Group meetings ended. Deborah and Sharon both claimed legitimacy based on their being active in their local community and from their having shared experience with other older people.  If they had chosen to accept it, they would also have been able to claim legitimacy based on having been appointed by other older people.  However, as they were not members of a clique, Deborah and Sharon had no powerful allies to protect their voice or find it a new outlet when Programme Group meetings ended.   Although they believed they had a legitimate right to speak for other older people, no one was prepared to listen to them. The results for them personally, and possibly for other older people, were as "distasteful and unsettling" as those described by Mitchell with regard to collaborations in commercial settings (Mitchell 1997, 882).

### Members protecting the Clique

These findings also illustrate how cliques will arrange and manoeuvre their members in order to protect the position of the clique.  For example, when the Council and CVSC were challenged by John, this was countered by the introduction of another member of their clique into the 50+ Forum, Hillary.  This cannot be compared with Loffler and Bovaird's concerns about people being insufficiently assertive.  John was sufficiently assertive to challenge the Council, CVSC and existing Forum members to the extent that he secured a direct line of communication between the Forum and the Welsh Government, he organised informal meetings for Forum members and he challenged the Council's use of Strategy funds for a service level agreement with the CVSC.  It is more likely that John was "got rid of" because he was assertive and gaining success in his challenge of the Council and CVSC.  His removal occurred

through the Council/CVSC/Health Board clique introducing another of their members when existing resources had failed.

*Contradictions inherent in clique membership*

Clique membership appears to be the underlying reason for people accepting the significant contradictions in behaviour or demands of organizations in positions of overarching authority.  Members of the 50+ Forum, AWF, the CVSC, Council and Welsh Government all exhibited examples of insisting on compliance with rules in one instance and then ignoring such rules later, and of demanding specific skills and resources in some circumstances and later not requiring them.  Members of the Forum and AWF gave examples of accepting glaring inequalities, believing (favourable and unfavourable) treatment of others was unjust, but accepting it for themselves.  Members of the Forum also continued with co-production, collaborative ventures when they believed that these achieved nothing, expressing frustration and even anger but continuing because doing so was an integral part of clique membership.

The findings of this research suggest that, if someone is not a member of a clique and has no motivation to join it, they will not accept being treated unjustly by it, or impose this treatment on others.  However if someone is motivated to become a clique member or values their membership, even though there may be underlying issues of prejudice or discrimination, they will accept continued unjust treatment of themselves and possibly accept unjust treatment of others.   These appear to be the more likely reasons for people not being involved with the Strategy for Older People, and possibly not even being aware of its existence.

# Chapter 9 - Conclusions

*"Is it a sublimation of our anger?  Is this a means of saying, we'll direct them into the 50+ forums so that they can have a chat there and get rid of all their anger and it really won't impact on us"*

(Porter et al 2007, 38)

This research started with a question posed by an older person during an earlier review of the Strategy for Older People in Wales:  is co-production supported and encouraged in order provide an outlet for people's interest or anger, diverting and thereby preventing them from having any influence on the decisions which affect them?  The chosen methodology was developed in response to Barnes' suggestion that, if participation is to make a real difference, we need to transform the way that issues affecting the lives of older people are thought about and discussed.  It involved going to where people live their everyday lives, allowing them to contribute in ways which they choose, and set their own "rules for engagement".  The research findings lend suport to some previous studies and theory concerning co-production.  At the same time, the findings identify contradictions which call into question the conclusions of other studies .  This work ends by defining how the application of theories of legitimacy, networks and power contributes to understanding co-production, but how this application also raises questions which remain unanswered and require further research.

Earlier research concerning co-production has concentrated on the over-representation of skilled, assertive lay people, suggesting that it is this which allows them to participate in the co-production process.  This has been described by Loffler and Bovaird as "where more assertive users tend to benefit most from their relationship with the state" (2010, 19), resulting in less confident, less skilled people being excluded from the co-production process.  This research finds that the ability to engage in co-production, and furthermore the permission to engage in co-production, is not dependent on having traditional committee skills or being

assertive. It is dependent on clique membership and the awarding of legitimacy by powerful clique members.

The research has identified claims of legitimacy based on 6 sources:

- Being active in the local community

- Sharing experience with the people being represented

- Being appointed or elected by the people being represented

- Having the skills necessary to be carry out the role well

- Legitimacy arising from being invited to be a representative; by being invited to join a collaborative group by people in positions of power who are already known to them.

- Legitimacy arising from support, recognition or appointment as a legitimate representative by people in positions of power.

It finds that the latter 2 forms, that is legitimacy arising from invitation by powerful people and legitimacy arising from support, recognition or appointment by powerful people, are what determine whether individual lay people are able to engage in co-production. Those whose claim to legitimacy is based on other sources may be excluded from the co-production process, regardless of the strength of their claim and regardless of their level of assertiveness or traditional, committee-based skills.

Furthermore, this research finds that securing these forms of legitimacy is dependent on clique membership, and so dependent on motivation and skills required to secure and maintain clique membership, such as developing networks, forming alliances and judging when to challenge other network members. This research finds that clique membership can lead to individuals accepting and embracing contradictory behaviour in order to protect the power of the clique. This contradictory behaviour includes alternating between an insistence on co-production mechanisms which are extremely formal and mechanisms which are equally informal. It also finds examples of members of minority groups who are otherwise very skilled and assertive

remaining silent, as to draw attention to any difference from the identity of the clique may present a challenge and so risk exclusion from it.

Finally, this research challenges earlier research findings regarding boundary spanners or champions; those individuals whose role is to support co-production. This research found examples of boundary spanners who were both employed and voluntary/lay members of the co-production process. For all, their claim of legitimacy was based on their being invited to be a representative by those in positions of power, or being supported, recognised or appointed by those in positions of power. Their actions and competencies reflected many of those suggested in earlier theories on boundary spanners, but their allegiance to the over-arching clique led to them limiting others' opportunities to engage in co-production. Rather than spanning boundaries, they became what Moore describes as "damp proofers" (1995), forming a barrier between lay older people and those who make decisions which affect their lives.

**Given the proportion of the population that the Strategy covers, do attempts to achieve collaboration with a community which those in power have termed "older people" challenge anti-social norms, or do such attempts reinforce and perpetuate them?**

This research was based on data collected from people of a wide age range, including people in their 50's as well as people in their 90's. Data were gathered from people who were active: they may have been members of committees or forums, but they were also members of walking groups, many had use of a car, they used public transport and they socialised in public venues. In common with the majority of the population termed "older people", they were independent and in reasonable health. They were not frail, requiring personal care or mentally infirm.

The people who participated in this research did not appear to view old age as a weakness. People boasted of using their bus passes, including those who had cars

and sufficient financial resources not to need them.  They mentioned taking advantage of age-related discounts or going on holidays available only to people over a certain age.  Whereas a number of women appeared conscious of anti-social norms relating to weight and body image, they were very happy to let people know their age.  Although age was sometimes associated with loss, this was often balanced with an appreciation of what had been lost.  Those who spoke of the loss of a partner also reflected on happy memories of married life, those who could no longer climb mountains enjoyed telling tales of mountains climbed ….. and occasionally falling off.  Rather than older age discouraging people from being active, they spoke of being encouraged to do more, partly as a result of having more time and fewer family and work responsibilities.  Notably, many people also spoke of having more confidence, of being willing to take more risks and to challenge those in authority.  Instead of being deterred from engaging by a requirement to self-identify as an "older person", being older had led to them being more confident to engage and if necessary to challenge.

Age brought some negative experiences.  Consequently, rather than age building trust in organisations or centres of authority, age had sometimes led to a build up of negative experiences leading to people not wishing to engage.  This lack of trust did not arise from people not wishing to be identified as "older people"; it arose from experience gained from the treatment they received from organisations or centres of authority when they were younger people, from their own experiences as older people and from the witnessed experiences of other older people.  These negative experiences went beyond a general disillusionment with the democratic process or with politicians.  They were individuals' experiences of dealing directly with paid staff rather than elected politicians, sometimes during the process of accessing services but often during the process of co-production.  Many spoke of having to wait long periods for a response from a statutory body and then being required to reply immediately, of being expected to park and then walk long distances in order to get to a meeting in a public building when (younger, more agile) council workers could park immediately outside, of being expected to collect and carry heavy exhibition equipment, travel long distances and work long hours without being provided with a cup of tea or a biscuit.   Deborah and Sharon spoke of using public transport, in winter conditions, to attend a meeting with the Council and not being offered an

apology, an explanation, or a chance for rest and refreshment. They were informed by a receptionist that this and all future meetings were cancelled and left to find their way home. Although said with a smile, Alice may not have been joking when she suggested that a Council manager dashed away down a corridor because she was frightened of her. During her period as Head of School within a large teaching hospital, it is extremely likely that a junior staff member who had failed to respond to Alice's repeated requests for information would have been frightened of her and would have had to face her wrath. Due to Alice's age, a member of staff in the council was able to ignore her, and there was nothing Alice could do about it.

The lack of trust added to an expressed fear of age discrimination and elder abuse. When speaking of these, people invariably spoke of it being rooted in or perpetrated by powerful public bodies: governments blaming "the ageing population" for the economic climate and difficulties faced by the NHS, threatening to take away age related benefits, or treating older hospital patients or volunteers with contempt. The language used by people when describing collaborative or co-production initiatives, such as "frightened" and "intimidate" was markedly different from the language used in government documents on the same subject. The language was not used lightly; it was used by people who had a wealth of experience and who understood what fear and intimidation meant.

The term "older people" presents difficulties because it is vague, leading to the obvious question of "older than what?" The term "50+" can be equally unhelpful, but these should not be viewed as reasons for not attempting to involve people over 50 in decisions which affect their lives now or which could in the future. However, the attempts considered in this research did not appear to take account of what being "older" meant to many people. The heavy reliance on formal, traditional methods of working did not provide the flexibility or opportunities to make decisions and take risks that many older people valued. Instead it brought unwanted administrative burdens, failed to give the social rewards that many desired and failed to recognise that older people's time and energy should be valued. Ignoring the fact that people over 50 may choose, or may have, to spend their time contributing to society through formal and "below the radar" voluntary work and paid employment reinforces a view of older people as non-contributing drains on society. Employing a development

officer to act as a boundary spanner and financial controller when older people have the skills to do this themselves illustrates a lack of trust and is patronising, reinforcing a view of older people as being incapable, in need of guidance and in need of control.  Rather than challenging anti-social norms, actions which were taken ostensibly to empower older people limited and sometimes took away opportunities for them to be involved in decision-making.  This reinforced and perpetuated existing anti-social views of older people being frail, in need of care and in need of guidance. It also created new anti-social views of older people presenting a threat to society; both as a group that drains and so threatens the stability of the economy on which society depends, and as individuals who cannot be trusted to act in ways which are "desirable, proper or appropriate" (Suchman 1995, 574).

## Does the balance of power within collaboration initiatives for older people in Wales govern and/or limit the approaches (or rules of engagement) adopted?

This research adds to earlier writings in finding that the choice of approach to, or rules of engagement for, co-production was not consistent.  Decision-making organisations, such as the Welsh Government and Council, as well as individual older people, frequently and rapidly changed their approach, contradicting earlier practices, statements and beliefs in the process originally espoused.  Assertions that engagement should adopt informal approaches in order to encourage less confident older people were rapidly exchanged with an insistence on extremely formal approaches, and then returned to with equal rapidity.  It is difficult to align the "Nothing decided about us without us" approach of the Council and CVSC when the 50+ Forum was initially established, with the CVSC's unannounced arrival at the AGM, followed by their taking control of the voting process and insistence on formal nominations and a secret ballot.  It is equally difficult to align the Welsh Government's support for the very informal development of AWF regional groups, where invitation was through word-of-mouth and agenda and minutes almost non-existent, with the immediate change in the constitution which occurred to secure John's permanent membership.

As is common in research into collaborations and co-production initiatives between lay people and statutory or formal voluntary organisations, this research found significant imbalances of power. There were examples of traditional, rational and charismatic power being used; of power being expressed in overt, covert and latent forms and of individuals and groups moving through sequences of gaining power and then being outflanked. It was clear that the choice of approaches, or rules of engagement adopted, were being limited by those with power in order to gain an advantage over others at any one time. The Council funded CVSC's initial insistence on nominations and secret ballots was instrumental in removing the existing chair, John, who challenged the funding arrangements and the CVSC's attempts to control expenditure. However, when John was replaced with Hillary, who did not present this challenge, nominations and secret ballots were no longer required; the rules of engagement changed. The Welsh Government influenced the decision to change the AWF constitution and so make John's position permanent. It was essential that John retained his position on AWF if he was to be able to retain his position on the NPF; a position that he had been invited to apply for, and then appointed to, by Welsh Government civil servants. The rules of engagement were changed, resulting in John's position being secure and so the Welsh Government being able to retain him as the AWF representative on the NPF.

In both these examples, advantage was gained through placing, or strengthening the position of a lay older person who was a member of the over-arching, predominantly statutory sector clique (as described by Provan, 2007), rather than through the sole efforts of a statutory or established voluntary sector body. Changes were not only made to the mechanisms for engagement; changes were made to the identity of the lay people being engaged. If AWF had been allowed to select its own representatives on the NPF, possibly John would not have been chosen. Hillary did not have the required length of experience as an Executive member to be nominated as Chair of the 50+ Forum, and the data suggests that she may not even have been nominated and elected to the position. As a CVSC Trustee with strong links with the Council, her replacement of John as Chair appears somewhat *deus ex machina*.

Formal approaches to co-production, including requiring legitimacy to be based on having an identifiable constituency, were dropped when the challenge to an

established source of power was removed.  Consequently individual older people holding power, or what Loffler and Bovaird (2010) refer to as "benefiting from the state" could not be attributed to their being assertive or experienced at working within traditional committee settings.  This research found that a motivation to develop second and third-circle networks, combined with skill in building alliances and judging when to challenge were far more important than skills relating to co-production mechanisms, such as committee or administrative skills.  This combination of motivation and networking skill led to clique membership; to being part of an identifiable group that included other, more powerful members.  Clique membership brought many benefits, not least of which was legitimacy.  The legitimate right to speak for other older people and to be listened to was far more dependent on being appointed and recognised by powerful organisations than on being nominated by older people themselves, having shared experience or having links with them.  Those who were not members of a clique were not given this legitimacy.  The observations and suggestions of people meeting in a pub on a weekday morning, or in a walking group, or of a man who spends his time gardening for a neighbour and shopping for his wife, would never be included for consideration in discussions on older people's services.  However, a powerful statutory or voluntary organisation would believe it legitimate to include the observations and suggestions of a person whose presence at a meeting was the result of attendance at another meeting and consequent invitation to attend this one.  Clique membership also protected this legitimacy.  As Deborah and Sharon found, individuals who were not members of a clique, could have their right to represent other older people removed without warning.  They could be denied an opportunity to find out why this had happened, and denied an opportunity to secure another position.  At the same time, clique members such and John and Hillary could have their legitimacy consolidated through the clique changing the rules of engagement, to the extent that their legitimate right to represent other older people could never be removed.

This research found that the protection, and so additional power, bestowed by a clique can give extraordinary power to individual older people.  Whilst the motivation to do good for other older people may have been unquestionable, Hillary's insistence on adopting the working practices of an earlier career, repeatedly described as "professional", undoubtedly dissuaded other older people from engaging.  Many

people left the 50+ Forum, and most of those who remained did not challenge the practice.  Overall, many older people simply never became involved with the 50+ Forum at all because they were not motivated to participate in a formal meeting. This clique membership also gave protection from challenge to decisions which contradicted earlier statements; such as the process of the appointment of a new Chair and Officers without receiving nominations or having a secret ballot. Protection, approval and resources awarded to John by the Welsh Government resulted in the organisation of informal meetings of older people in a geographic area where the 50+ Forum had recently made clear that engagement should be through formal mechanisms.  The cost of these events was very low, and so could possibly have been organised without external finance.  However, it is unlikely that success in securing attendance from the Older People's Commissioner and AM would have been achieved without this Welsh Government support, and there would not have been the avenues for reporting the findings of these meetings to the Welsh Government.  Hillary and John displayed characteristics and behaviours very similar to those of Moore's "damp proofers", preventing power being passed from established sources of authority, such as the Welsh Government or Council, to other older people.  However, unlike in Moore's example, the source of their power was internal to the collaboration, and arose from the individuals' motivation and networking skills.

This research also found that it was clique membership, not assertiveness or lack of experience of formal ways of working, which silenced minority groups.  People such as Lucia and Jennifer, who were proud of their individual identity and who were involved in and supported their minority communities, avoided drawing attention to this.  Whilst there were references to personal experience of and empathising with people who felt intimidated because they didn't speak English, to appreciating support received relating to a disability, and to being proud of one's language and heritage, no one suggested adapting methods of working to accommodate people who spoke other languages, needed other assistance or felt out-of-place within the predominant culture of the clique.  To do so would have drawn attention to the difference between them and the common identity of the clique, possibly representing a challenge and therefore risking exclusion from it.

In answer to the research question; power was unevenly balanced within the collaboration initiatives considered in this research, and this did govern and sometimes limit the approaches adopted, resulting in some people being excluded from the process entirely. However, it was not a simple balance of power between statutory organisations and older people, and the results at times were as "distasteful and unsettling" as those in commercial settings described by Mitchell (1997, 822).

**Do existing approaches to collaboration exclude many older people, leading to decisions which are not legitimate and to outcomes which are unjust and not inclusive?**

Earlier reviews of the Strategy for Older People in Wales, along with other research on collaboration and co-production initiatives involving older people, have established that many older people are excluded. What has been less clear is whether this is through personal choice or the action of others.

This research has concluded that legitimacy within co-production is something that is conferred by those in positions of power. The research has found examples of approaches to co-production being imposed rather than accepted willingly by older people, and of such approaches being accepted as legitimate when there is no legislative or policy basis for doing so. Furthermore, this legitimacy has been accepted by some older people as well as by those in positions of power, even when this acceptance has contradicted other beliefs or behaviours. This legitimacy has also been accepted when known to be against the wishes and possible best interests of other older people.

In concluding that legitimacy is something conferred, and it is this conferring of legitimacy that excludes individuals, the question remains of whether consequent outcomes are just. Rawls described justice as "the first virtue of social institutions" (3), proposing a theory of justice based on two principles:

> "First: each person is to have an equal right to the most extensive basic liberty compatible with a similar liberty for others.
>
> Second: social and economic inequalities are to be arranged so that they are both (a) reasonably expected to be to everyone's advantage and (b) attached to positions and offices open to all"

> Rawls 1972, 60

This second principle provides a theoretical framework for considering whether the outcomes of co-production within the Strategy for Older People are just. Certainly the conclusions of this research suggest that the positions and offices associated with co-production within the Strategy for Older People in Wales are not open to all and so would not meet this principle. Claims of legitimacy based on having the required skills, or of being part of a social network which leads to invites to join a co-production group, or of having one's position protected due to clique membership, all result in other people being excluded.

This research has never suggested that those lay-people involved in co-production have acted in a way that could be viewed as against the public interest. The 50+ Forum and AWF comprised of people who dedicated significant amounts of time and energy to benefitting others, and all indicated that they wanted to achieve what was best for older people. The research also found many examples of actions by forums and individuals which benefitted other older people. What this research questions is the justice of players such as Hillary and John being given legitimacy and having their legitimacy buttressed and protected, when the voice of others, in this case Sharon and Deborah, can be silenced. Rawls asserts that in such cases:

> "those kept out would be right in feeling unjustly treated even though they benefitted from the greater efforts of those who were allowed to hold them *(ie positions within the co-production).* They would be justified in their complaint not only because they were excluded from certain external rewards of office such as wealth and privilege, but because they were debarred from experiencing the realization of self which comes from a skilful and devoted exercise of social duties. They would be deprived of one of the main forms of human good"

> Rawls 1972, 84

This research questions whether Rawls is correct: whether the exclusion of players such as Sharon and Deborah and the many other people interviewed and observed, amounts to injustice because this exclusion deprives them of "one of the main forms of human good".

For the people who participated in this research, there were examples of people being willing to give responsibility for decision-making to others, simply because they were already doing it well and the individual wished to give their time to other things. However, this is not the same as not being interested in the decisions being made and many people expressed a strong interest in decisions made which affect older people and which may affect them personally either now or in the future. They also indicated that they were not always satisfied with the decisions made by others. There was no evidence to support a suggestion that low levels of engagement with the co-production structures established to support the Strategy for Older People in Wales is an indication that older people don't care about what is happening to other older people and don't care about what might happen to them. There was evidence to suggest that any policy maker who believed that people would re-arrange their work, social and family commitments in order to attend the 2.00pm meeting of their local 50+ forum the day after their 50th birthday, or even after their 70th birthday, was out-of-touch with the population they wished to serve.

This research found many examples of people being excluded because they were simply not motivated to engage with the mechanisms of co-production offered. This does not mean that they were not interested in participating in decisions which affect older people, or that they didn't wish to take action to help other older people. When deciding how to spend their time, meeting friends, giving practical help to someone in need or following a sport or cultural interest was more appealing than attending a forum meeting. Generally men were not motivated to engage with something which took them outside of their established first-circle networks and offered few opportunities to develop social, second-circle networks. Men also appeared less inclined to view forum membership as an opportunity to maintain an earlier professional identity, although it should also be remembered that not all people over

50 have the choice of being involved in a forum on a voluntary basis. Many questioned why paid professionals felt that older people would be happy doing something for nothing when they expected to be paid for it; an expectation which reinforced the idea of older people being worthless as well as excluding those who were not in a position to give their time for free and discouraging some who were.

The approaches to co-production adopted, both those which were very formal and those which were less formal, attracted people who were motivated to build their social networks and who had the skills to do so. Although they may also have been motivated to participate in decision-making for the benefit of other older people, this has implications for the legitimacy of the contribution made. Despite claims of representing an identifiable constituency, claims of shared experience or of having strong networks with other older people, legitimacy appeared something that was awarded and buttressed by those in positions of power. It was not something awarded to older people by other older people. Furthermore, the influence clique membership had on those who had been awarded legitimacy led to actions and decisions which were inconsistent and contradictory, thereby exacerbating any initial exclusivity. This research found some examples of organisations in positions of power deliberately excluding older people, for example by not inviting them to meetings. However, there were many more examples of older people taking decisions which excluded other older people. Even in extreme examples, this did not appear to be because one older person or a group of older people had a dislike of or wished to harm another older person or group of older people. It arose when someone challenged the authority of a powerful organisation to which other older people were closely aligned, and their collectively taking action to remove this threat.

However, regardless of frustrations with the structure adopted, it finds that lay older people are able to represent other older people and be listened to because of legitimacy arising from their being invited to be a representative, or by being given support, by people in positions of power. Their legitimacy is not reliant on their being active in their community, sharing experience with those they represent, being elected or having the required skills. Rather than spanning boundaries and bringing decisions makers and older people together, they often form a barrier.

Outcomes of such co-production could therefore be viewed as unjust because the approaches adopted exclude people from opportunities to exercise their social duty: duties which they are motivated to exercise and with outcomes they wish to influence. However it is probably impossible to develop an approach which is totally inclusive, any more than it has been possible to achieve 100% participation in government elections. Although many of the approaches adopted currently do exclude some older people, and this research has identified possible solutions for making approaches less exclusive, a perfect procedure is unlikely to be found. A further question must therefore be asked, regarding the justice of the procedure. In describing procedural justice, Rawls outlines three concepts: perfect procedural justice, imperfect procedural justice and pure procedural justice (Appendix 11 refers). All three concepts are based on the setting of criterion by which outcomes can be judged or decided, and the establishment of a procedure which will lead to the desired outcome. Perfect procedural justice comprises the possibility of setting independent criterion and devising a procedure that is sure to give the desired outcome, imperfect procedural justice comprises independent criterion but no feasible procedure and pure procedural justice comprises no independent criterion but a correct or fair procedure.

This research has found a dichotomy between what "being older" means to many older people and the organizations wishing to co-produce with them. As well as reinforcing anti-social norms, this suggests that there can be no independent criterion for the correct outcome for co-production within the Strategy for Older People and so perfect and imperfect procedural justice are unattainable. Co-production within the Strategy for Older People also has no feasible procedure which would automatically lead to all older people being able to "be involved in the decisions that affect their daily lives (Welsh Government 2013, 21). Pure procedural justice is therefore also unattainable.

Consequently this research ends by concluding that outcomes of co-production are unjust, not because of the approaches adopted, but because the concepts of legitimacy espoused exclude people from opportunities to exercise their social duty: duties which they are motivated to exercise and with outcomes they wish to influence.

**End Note**

*The need for further research*

This research is based on a small sample group of older people, in a specific geographic location and in relation to a specific Welsh Government policy. There are comparable co-production forums of older people throughout the UK and beyond. It would be useful to carry out similar research in other areas in order to judge the extent to which the theories of legitimacy, and associated findings concerning motivation, networks, and boundary spanners are common to such forums generally.

The data were collected from the 50+ Forum during what was possibly a period of crisis. It was a period when funding to support co-production activity associated with the Strategy for Older People was coming to an end, and there were other conflicts and challenges facing the Welsh Government, local government and the established voluntary sector. Further research at a later date may help to give further understanding to the research findings concerning clique membership and legitimacy. This research is based on a snapshot of a particular period of time. It would be useful to be able to gather further data after there has been a change of key players, or when funding priorities or political support for co-production have changed. It is possible that with different characters, or different external pressures, some of the contradictions apparent in this research would no longer exist.

As discussed in Chapter 3, this research is based almost entirely on data collected from lay older people. Other stakeholders, notably the CVSC, Council and Welsh Government were excluded. The data included examples of lay older people being unaware of structures or mechanisms developed to engage them with the Strategy for Older People. There were examples of lay older people admitting to being confused by co-production mechanisms, of conflicting interpretations of events and of lay people claiming not to understand and to have not been informed of the reasons for some actions of the Welsh Government, Council or CVSC. There were also reports of people feeling hurt, patronised and angered. It is very likely that, if they had been allowed to contribute, representatives from the Welsh Government,

Council or CVSC could have clarified some events, interpreted other events differently, and challenged the statements made by some lay people. It is also possible that, if these had been reported to me, I personally would not have found there to be any confusion, poor communication or lack of respect for older people and the research might have reached different conclusions as a result of this. Further research is therefore needed to give a voice to these other stakeholders. However I believe that future research will benefit from a work based solely on data collected from lay older people as it adds a dimension to the overall literature where research based on data collected from lay people is comparatively small.

It would be useful to consider whether older people are a distinct group, requiring separate approaches to co-production. The people involved in co-production in this research were different from many of the populations that policy makers wish to engage and to empower. For example children and young people, regardless of their social group, will not have been senior managers in multi-national companies and so will not have the experience and skills which such a position requires. Other groups may not have such skills or experience because of disadvantage and discrimination, or because of disability or ill health. However, the application of legitimacy, network and power theory in this research, and the consequent findings may have implications for these other groups. Although they may not be able to call on the skills and experience of a retired senior manager, this does not mean that they have no skill at all. Further research is needed to judge whether boundary spanner roles in co-productions with groups who have fewer, or different skills and experience support empowerment, or whether they limit and control by forming a "damp proof" barrier.

Finally, further research is needed with other groups in order to test the application of legitimacy theory proposed in this thesis. Whilst age, disadvantage, disability or ill health may limit opportunities to hold or develop traditional committee skills, they may present fewer or different limitations for developing clique membership. It is possible that legitimacy arising from being invited or supported by those in positions of power rather than arising from being active in the community, sharing experience or being elected by peers is a common phenomenon. If this is so, then the value of all co-production is open to question.

***Reflections on the value of the methodology used in this research: protecting, involving and allowing the vulnerable to be heard***

This research aimed to address the challenges and barriers inherent in many popular methods of data collection. Consequently they were often more time consuming and demanded skills which might not be common to all researchers. This would possibly have cost implications should they be used in future research.

My initial concern that my identity, both as a PhD researcher and as an older woman, would have implications for how people responded to me, did have foundation. Although many participants were very candid, I share Russel (2007) and Stephenson's (1999) concerns of interviewer gender bias and believe that responses to my questions in semi-structured interviews, and even undirected conversations, were affected by my being a woman. Female and male participants were also open in their (sometimes amused, sometimes disbelieving) response to the suggestion that a middle aged woman "chatting up old men in pubs" or "going for a walk" could have any serious purpose. They questioned the method, but also the value of the researcher (as opposed to the research). Consequently future research faces a challenge of how to develop methods where policy makers and research subjects value the research question, the contributor's worth and the worth of the researcher (Jehu 2014a, 15).

Whilst the higher cost of a method that is useful could be viewed as an investment, this methodology also raises questions of ethics. Although the proposed methods received ethical approval, their implementation immediately raised ethical dilemmas with participants either objecting to sign consent forms, or refusing to do so. However, whilst this was discussed at the time and action was taken to ensure that anonymity of participants who did not give written consent could be ensured, other data which had been provided with full, informed consent, presented further ethical dilemmas as it proved extremely difficult to anonymise these contributors completely.

This dilemma is not new. For example, Damianakis & Woodford (2012) write of the need to take extra steps to remove identifying data when reporting on small

connected communities in order to ensure anonymity.  However for this research, identifiers such as gender, race or past experience were often important factors which gave significance to an individual's contribution.  Words such as "frighten" or "intimidate" used to describe the behaviour of people in positions of power in statutory organizations are given a particular weight when they are spoken by people who have personal experience of politics in 1940's Italy or of senior management in multi-national organizations.  The meaning would be different if they had been spoken by people who had no experience of dealing with people in positions of power in statutory organizations, or whose experience was limited to involvement with statutory organizations.  Similarly, irritation or amusement at being offered a certificate to add to one's cv has a specific dimension when it is expressed by someone who established and headed a university-level teaching establishment for 30 years.

When researching co-production, questions also arise concerning whether consent is required from an individual, or from a community, especially in instances where the contribution of an individual can have implications for others (eg Flicker & Worthington 2012, Quigley 2006).  Certainly the contributions made by many people in this research had implications for others, and retaining identifiers for these individuals has possibly made others identifiable as well, despite attempts to anonymize data as much as possible.  Contributors did make fully informed consent, and so difficult decisions must be made regarding how to use such data.  As has been found over the centuries, attaining a balance between a duty to do no harm and a duty to contribute to learning has never been simple.

It has been found that retaining rigid ethics processes is unlikely to prove useful, either for researchers of co-production, policy makers or the people such policies aim to benefit.  Malone et al (2006) describe the anger of community participants when an ethics panel refused permission for their proposed method because of potential risks to participants. This led to the community carrying out the research alone, possibly posing greater risks.  This anger of community participants can be compared with Hillary's annoyance, reported in Chapter 3, that Forum members

were required to sign consent forms when the Forum meeting minutes recorded that consent had been given.  Inconsistencies in the judgments of ethics boards is evident when contrasting this with Flicker & Guta (2008), where parental consent was not required for adolescents participating in research on sexual health. Progress has been made, for example Burns' description of an ethics committee accepting that older people could be viewed as "collaborators" and consequently involved prior to gaining approval for case study research (2014, 138).  However, these people were easily engaged (they were care home residents), and consent was obtained for the case study itself.  This ease of engagement is not always possible.

This research does not wish to suggest that ethical considerations should be abandoned.  However, the findings suggest that some of the processes required can lead to some people being excluded from the research process, particularly those most vulnerable and who most need statutory organisations to hear and address their particular needs.  Denying people the opportunity to contribute is detrimental to the research process, and it is detrimental for policy makers and service providers who wish to co-produce and involve people in the decisions which affect their lives. As co-production grows in importance in policy development and service planning, ethics committees will need to consider how their practices can be adapted so that they do not exclude, whilst at the same time ensuring that the consent, dignity, rights, safety and well being of participants continue to be safeguarded (Jehu 2014b).


***Achieving the Welsh Government aim for Wales to be "a great place to grow old":  Implications for policy development and practice***

Notwithstanding the need for further research, this work contains findings and reaches conclusions that may be of value to policy makers and practitioners.

- **Networks and cliques:** The conclusion that membership of structures or mechanisms developed to give a voice to older people, regardless of how informal, is dependent on networks and networking skills, has a number of

important implications for policy makers and those responsible for implementing such policies.

A reliance on motivation to develop networks and join cliques has been shown to be one reason for some groups not being adequately represented in the mechanisms established  to "hear the voice of older people and allow older people to be involved in the decisions that affect their daily lives" (Welsh Government 2013, 21).  For example, it gives some level of answer to the question of why men are generally under-represented and so their voices not heard in discussions about both general matters and matters with specific gender-based implications.  To address this under-representation, policy makers and practitioners need to go beyond an assumption that older people simply will, or should, be motivated to engage with policy-makers' mechanisms, networks and cliques.

This assumption can, and in many examples, has been addressed by some. Even within the examples provided by members of the 50+ Forum and AWF, there were instances of statutory or established voluntary organisations taking steps to go beyond formal structures.  However, this does not address the challenges, and sometimes barriers, arising from network membership and inter-personal relationships.  Such relationships are not dependent on attributes such as the identity of one's employer or one's age, and are not dependent on tangible skills which can be built through attendance on a capacity building course on "meeting skills".  Whilst some practitioners will point to examples where individual lay people have been greatly empowered by such capacity building initiatives (such as in the WLGA "showcase", 2009), it should be considered whether this empowerment was achieved because of the content of the training, or because the experience of attending provided opportunities to build inter-personal relationships with clique members.  If this is the case, then policy makers and practitioners should possibly reconsider how best to invest such resources in future.

Finally, what has not been addressed, and so what poses a greater challenge, is the matter of clique allegiance; of people protecting other clique members even though this may be damaging or unjust to others. This research has been useful in identifying that power imbalances within co-production are not simply an imbalance between established statutory and voluntary organisations and lay people.  These imbalances result from clique membership, the consequent buttressing of legitimacy of some voices and the removal of the legitimacy of others (Jehu 2014c, 17).  Allegiance to clique membership, by both the most powerful members and the less powerful members, has been shown to lead to voices being silenced.  Addressing this challenge will not be easy.  It is understandable that a policy maker, practitioner or lay person who believes in and is committed to the achievement of a strategy would use their own personal networks in order to draw in resources, add legitimacy and achieve their aim.  It is also understandable that someone who has experienced discrimination or a lack of respect, or whose current position (such as being labelled part of the "ageing population") places them in a position where they fear discrimination or lack of respect, would be cautious of acting in a way which might lose them the protection of a clique.  However, those who are committed to the achievement of a strategy should take time to reflect on the true results of the actions taken, even when this requires attention to some of the more uncomfortable findings of research such as this.  When there are known "silent voices", policy makers and practitioners could start by asking why these voices are silent within the structures which have been established.  Whilst organisations represented on the National Partnership Forum, such as the LGTB Elders, Wales Mental Health Alliance, Disability Wales or the Older Minority Ethnic Network clearly have an important role, practitioners could ask why people who may be represented by these groups are choosing not to speak for themselves within the 50+ forums of which they are members.

- **Promoting volunteering:**  Volunteer motivation was considered in this research partly because participation in any co-production is a voluntary

activity and partly because volunteering is promoted by policy makers as beneficial to society generally and to older people specifically.  The research concluded that opportunities for career advancement, such as being able to cite course attendance on a cv, were more likely to deter than to motivate, yet it is not unusual for policy makers and practitioners to propose this as a strategy for engaging older people.  Conclusions relating to age bringing greater experience, greater confidence and a willingness to take risks should also be considered by policy makers.  Policy makers should ensure that strategies for motivating older people to engage in all types of volunteering, not just co-production, do not ignore the experience and confidence of older people and do not limit opportunities for independent decision making and risk taking.

- **Recognising below the radar voluntary activity:**  This research highlights the extent of below the radar voluntary activity among older people.  Failure to recognise this has possibly led to policy makers judging that older people need to be supported and encouraged to volunteer, and consequently investing in capacity building initiatives and posts. Such investments divert resources from areas where there is need.  Of relevance to the Strategy for Older People, these investments also under-value and potentially undermine the voluntary activity that is taking place, and the older people themselves.

- **Social benefits of volunteering:**  The importance of social benefits in motivating people to volunteer has implications for co-production initiatives. Policy makers should therefore consider the implications of advocating co-production mechanisms which do not offer social benefits, and of limiting or discouraging the provision of such benefits.  If volunteering and co-producing are viewed as being of public benefit, then strategies to motivate should also be viewed as of public benefit and not disregarded as " a jolly" or wasteful.

- **Gender:**  Gender differences in network development also have implications for policy makers.   A reliance on co-production strategies which are based on

second and third circle relationships is contributing to men's voices not being heard.  It is possible that policy makers are already conscious of this and are taking steps to address the matter, but if they are, the older people in this study were not aware of it.  Any policy decisions which limit opportunities for older men to develop their own close networks, such as the removal of free bus passes or an insistence on formal co-production mechanisms, will limit the voice of older men even further (Jehu, 2014a)

- **Welsh language**:  The data suggest that Welsh is used within voluntary organisations to a greater extent than might be supposed from other records.  Certainly the Walking Group, which was governed by the national voluntary organisation Groundwork, was not reported to be an organisation that delivered services through the medium of Welsh.  The instances of people claiming not to speak Welsh, but being observed speaking Welsh naturally and instinctively on many occasions, is possibly a reflection of the lack of confidence that has been noted by Prys and others.  However, this group and others like it need to be considered by policy makers when making judgements of Welsh language use and development.  Such groups also present a useful resource.  For example, this group's future was a risk because of cuts in funding from Groundwork, yet public funds were being invested in the same area to develop groups where people could practice and develop Welsh language skills in informal settings.  What Rittel and Weber might describe as the "wicked issue" of sustaining the Welsh language might be addressed by providing such a group with the funds it needed to continue, and advertising the fact that people were welcome to "walk and talk" or "cerdded a siarad".

- **Free public transport**:  This work supports earlier studies based on the experiences of older people, such as the Submission to the Inquiry into Integrated Transport by the Older People's Commissioner for Wales (2010).  Members of all four data groups spoke of the importance of free public transport which went beyond it providing a means of travelling between places for those who might not be able to do so otherwise.  Not having to pay for transport allowed people to do things and go places they would not have if

they had had to consider the cost involved. This resulted in people remaining in contact with family and friends and it resulted in people doing things they had not done previously. Consequently free public transport was not just an enabler, it was a motivator. Policy makers have to make judgements on use of resources, but when considering the costs of providing free bus transport to everyone over the age of 60, regardless of income, comparisons should be made with alternative costs. What would be the cost of establishing the informal walking groups which had developed from the Village Walking Group and Rail Rambler groups? Currently both of the "official" groups incurred costs of insurance, publicity, leader training; and the Village Walking Group had also incurred initial development costs to engage and motivate people to join the group in the first place. These informal groups had grown naturally from the established groups because of the opportunities presented by free public transport. Whilst the formal Village Walking group might eventually fold because of lack of funding, the informal group was likely to continue for as long as the members were able to travel to a starting point for free and so free transport supported the sustainability of the initial development cost investment. What would be the cost of establishing a group for the men such as those who met at the town centre pub? It is unlikely that the pub would have allowed a public or voluntary organisation to establish such a group in its premises without charge and a different venue may not have provided the environment the men sought. There would still have been transport costs, and the cost of engagement and capacity building would probably be equivalent to a number of employed positions. Furthermore, the outcome of these measures would possibly be inferior to what was currently being achieved.

Members of all four groups spoke of how access to free transport made a valued and vital contribution to their lives; supporting them to take part in formal and below the radar voluntary action, enabling them to remain active participants and contributors to their immediate social circle and to their wider community, maintaining physical and mental health and wellbeing. Free transport enabled older people to do this without the support of "special transport" or the assistance of a younger, paid "development officer" or

"coordinator".  The words of one contributor that "the cemeteries would be full without them" were not spoken lightly.

This research does not wish to ignore the fact that there are older people who are frail, require personal care or who are mentally infirm and so need extra support.  However, it does wish to emphasise, to policy makers and others, that the majority of people over the age of 50 are independent and in reasonable health.  The contribution of free bus passes to the achievement of the Strategy for Older People in Wales' objectives should not be underestimated.  Indeed some of the participants in this research might reasonably argue that having free transport contributed more to making Wales a "great place to grow old"  than any number of forums.

## Appendix 1

## Pawson, R., Boaz, A., Grayson, L., Long, A. and Barnes, C., 2003, *Types and Quality of Knowledge in Social Care*, London, Social Care Institute for Excellence, pp 25-26

Here we conclude by spelling out in a little more detail the primary categories of the source-based classification.

*Source 1. Organisational knowledge:* all modern organizations engage in governance and regulation, and these activities provide the broad knowledge frameworks that shape social care. Such materials furnish an overview of the operation of social services in the wider contexts of government agencies, local and regional authorities, and local communities.

*Source 2. Practitioner knowledge:* social care is conducted through the medium of practitioners' knowledge. Some of this is quite tacit and based on the social worker's or probation officer's experience of dealing over and again, with clients from similar backgrounds, facing similar problems. Practitioner knowledge tends to be personal and context specific and, therefore, difficult to surface, articulate and aggregate.

*Source 3. User knowledge:* users of social care services are not passive recipients of 'treatment' but active participants in their own 'care'. They posses vital knowledge gained from first-hand usage of, and reflection on, interventions. This knowledge, once again, also tends to remain unspoken and undervalued.

*Type 4. Research knowledge:* among the most palpable sources of social care knowledge is that derived from empirical inquiries based on predetermined research strategies. These provide the reports, evaluations, assessments, measures and so forth, which are the most orthodox item in any evidence base. The social care database needs to respond, however,
to the particularly broad church of perspectives and paradigms that make up its research base.

*Type 5. Policy community knowledge*: this category sets social care in its wider policy context. Despite its diversity, social care can be thought of as one set of provisions among dozens of others made available by the public and voluntary sectors. Vital knowledge about the organisation and implementation of services thus exists in the broader policy community of ministries, civil service, think tanks and agencies.

# Appendix 2

**Elke Löffler, E. & Bovaird, T, 2010, Taking stock of user and community co-production: A future research agenda, British Academy of Management conference, Birmingham, Public management and governance track, 18-19**

**Specific research issues with potential for future research**

A range of new research issues have been explored in this paper which it would be valuable for the Research Councils to address in the medium to longer term. …

From the point of view of *community co-production* these include:

- An investigation into the ways in which various forms of co-production, and collective co-production in particular, build trust and solidarity through developing the relationships between citizens and between citizens and government.

- An examination of the ways in which co-productive approaches, and the involvement of active citizens, can be used to challenge anti-social norms and boost community outcomes.

- An investigation into the extent to which collective approaches to co-production can escape the equity challenges of individualistic approaches, where more assertive users tend to benefit most from their relationship with the state.

- An examination of the institutional barriers to rolling out more radical forms of collective co-production such as PB. How can resistance within traditional local government structures be overcome?

- Further study of the ways of encouraging involvement in collective co-production: in particular, given financial constraints on local government, there is room for further examination of how the internet can be used as a means of reaching a wider group, especially in rolling out PB programmes.

## Appendix 3

## Exploring research methods

British Academy of Management
Research Methodology Special Interest Group

Workshop

Sharing the Struggle: Construing the Research Journey

Strathclyde Business School, Glasgow
Tuesday 1 December 2009

### Outline Schedule

| Time | Activity | |
|------|----------|---|
| 10:00 | Introduction and welcome | |
| 10:10 | Expectations and Anticipations | |
| 10:30 | Constructive Alternativism | |
| 11:30 | | Break |
| 11:45 | Choosing PCT – examples of applications | |
| 12:30 | Question & Answer Session | |
| 12:45 | | Lunch |
| 13:30 | Highs and Lows of the Research Journey | |
| 15:00 | | Break |
| 15:15 | Highs and Lows of the Research Journey – continued | |
| 16:00 | Close | |
| 16:30 | Reception hosted by Strathclyde Business School Level 2 Department of Management | |

# Introduction to Framework in NVivo

## Structure of the day

- First session
    - Participant introductions
    - Introduction to Framework method
- Rest of the day
    - Introduction to Framework approach in NVivo software
    - Building analytical framework
    - Coding data
    - Summarising data
    - Viewing data
    - Closing discussion

# Appendix 4

## Pen portraits

| Forum and AWF members | |
|---|---|
| Alice and Jennifer (interviewed together in Jennifer's home) | Alice: 50+ Forum Vice Chair, Jennifer 50+ Forum Executive member. Alice and Jennifer became friends during their careers in the NHS, where Alice was a Head of School and Jennifer was a physiotherapist. Alice also acts as Jennifer's sighted guide as Jennifer is no longer able to have a guide dog due to her age. Alice came to the area from Lancashire in the 1970's as a career move, Jennifer was born in the area, describing herself as "British" as her parents moved to the area from London. They are both active in many local and national voluntary organizations, and Jennifer is also a community councillor. At 94, Jennifer is the oldest member of the 50+ Forum. |
| Bronwen (interviewed at home) | 50+ Forum Executive member. Bronwen joined the 50+ forum when it was first established. Bronwen was born in the area and is a Welsh speaker. She moved to the North of England early in her career, but later returned. She is a retired primary school teacher and active in her local church. |
| Catherine and Peter (interviewed together) | 50+ Forum member: Catherine joined the 50+ Forum at the 2012 AGM. She recently retired from social work following a brain tumour. Peter is her husband, drives her to meetings and helps her read paperwork etc, but has decided not to become a member himself. |
| Deborah (interviewed with Sharon, coffee shop) | 50+ Forum Executive member. Deborah is one of the remaining original members, and past chair. Deborah was brought up in South England and had a long career as a nurse working in various parts of England. She moved to Wales to care for her brother and retired shortly afterwards. |
| Elaine (interviewed at home) | 50+ Forum Secretary: Elaine was born in Yorkshire and has lived in many places due to her ex-husband being in the army. Elaine moved to the area about 5 years ago to help her daughter with child care. Due to poor health, Elaine has not had paid employment for some time, but is an active volunteer involved with a number of organizations. Elaine has been a member of the Forum for about a year. |

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| Emma<br>(interviewed at home) | 50+ Forum Treasurer: Emma was born in London but moved to the area as a young child. Emma became involved in voluntary activity when her children were young. She went on to work for the CVSC where part of her role was to provide admin support to the 50+ Forum. She continued her involvement when she retired. |
| Hillary<br>(interviewed at home) | 50+ Forum Chair, CVSC Trustee: Hillary was born in the area and is a Welsh speaker. She read chemistry for her first degree, and went on to work for a multi-national company, consequently studying for a higher degree in America. She left when she started a family, but was instrumental in setting up playgroups when her children were young. She went on to become involved in local voluntary organizations supporting children and families at a local and national level, chairing national organizations and becoming a member or UK and Welsh Government policy development groups |
| Janet<br>(interviewed in CVSC office where she used to work) | 50+ Forum Executive member, CVSC Trustee, County Council elected Member (Labour). Janet was born in the area, moving away for a short period when her children were young, but then returning. Janet started her career as a nurse, but moved into a career in the voluntary sector. Janet has also been active in voluntary organizations supporting children and families, and has been an active member of the Labour Party. She has close family ties with Maria and Margot, and has worked alongside Hillary in various voluntary organizations for over 50 years. |
| John<br>(interviewed in hotel) | Founder member of AWF, member of NPF, past chair of 50+ Forum. John has lived in many parts of English and Wales, but moved back to the area on retirement |
| Kenneth<br>(not interviewed, observed at AWF meetings) | Founder member of AWF and past member of the 50+ Forum. Kenneth moved to the area from SE England. |
| Liz<br>(interviewed at home) | 50+ Forum Executive member. Liz worked in local government from late teens to retirement. She was an active trades union member, and is now active in the Retired Members union branch. Liz has spent her life living in the area. |
| Lucia<br>(interviewed at home) | 50+ Forum Executive member, AWF regional group member. Lucia and her husband moved to the UK from Italy at the end of the Second World War to join her brother-in-law who had been a prisoner of war. They established a successful business and Lucia continued with this following her husband's death. Lucia qualified as a counsellor with Cruse, and has been active in many other voluntary organizations. |
| Maria & Margot<br>(Maria interviewed at home. Margot not | 50+ Forum Executive members: Sisters born in London, Maria and Margot spent part of their childhood in the area during the Second World War due to family ties. They both went on to marry men from the area, |

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| interviewed, but observed at Forum meetings) | and so returned as adults. |
| Mark (interviewed in hotel) | Former 50+ Development Officer and current member. Mark lives outside the area, but is eligible for Forum membership as he works for a voluntary organisation in the area. Mark retired from police force, where he was (civilian) head of forensics |
| May (interviewed at home) | Member of the 50+ Forum, active in many other voluntary organizations. May was born in a British colony and moved to area 50 years ago on marrying a local man. They divorced shortly afterwards and May then joined the forces and travelled extensively. May returned to the area on retirement. |
| Sharon (interviewed with Deborah, coffee shop) | 50+ Forum Executive member: Sharon was born in the south of England and moved to the area when her children were young, to work as a nurse. Sharon was an original member of the Forum. This was her first involvement in any voluntary activity, but she went on to hold officer roles and was a member of the (local authority led) Programme Group. |

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| **Town Centre Pub: descriptions taken from observation notes** |

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| 5 men<br><br>A man from one of the tables stood up and walked towards us. Something about his walk, and the attentive grins on the faces of the group he's just left, told us we'd been noticed. The man came straight towards my friend and pressed what at first appeared to be a collection of £50 notes into her hand and said:<br><br>"here you are love, share this between the pair of you"<br><br>On closer inspection, it was actually fake money printed onto a paper napkin, and by this point the group he'd left could hardly contain their mirth.<br><br>The man was well turned out in a waterproof padded jacket, pullover, shirt and tie and proper trousers. He had clear, pink skin that goes with being outdoors and generally having a good life. He told us that he came to the town every day and then travelled on to the next own. He came to this town just to come to this pub and meet up with his friends. In the next town he went to a small chapel where they hold different events each day:<br><br>"Tuesdays it's a craft fair, Thursdays they sell nick-nacks …… and they have a raffle".<br><br>We then went with him to join the rest of his group and briefly explained what I was doing. Although they were all dressed much alike, there were differences between then. One was also a farmer, and he also had the same glow. At one point the group joked that the two farmers were the ones with lots of money, and I was shown a photograph of one farm which looked like a small manor house. The farmer also spoke of having a full size billard table in his house, but of prefering to go to |

a pub in the next town to play because then he met other people. One man had been a train driver, and had moved to the town in the 1960's to work as a hospital porter. His clothes were well cared for, but they were not of the same quality as the farmers', and he was wearing a baseball cap. When we were talking about where people lived, he seemed cautious about saying where he lived …. "about 4 miles away ….. yes towards …. Ok I'll tell you then", and only said that he lived on the a housing estate in a Communities First area when he found out that we both lived close by. The other two were ex-miners, and their skin still had that blue-dark shade of coal dust that never seems to go away completely. One lived in village about 5 miles away and the other lived in what he described as "the warden controlled place" in another village.

Given where they all originated and had spent their lives, it is highly likely that they all spoke Welsh. However they addressed us in English and our conversation remained in English.

The retired hospital porter seemed to be the spokesman for the group. He said that they all came there every day because:

"we're all widowed, we're all on our own, so we come here to meet our friends and have a chat"

He went on to say:

"I come here every day, every day except Sunday ….. but I don't go to Chapel on Sunday, I don't bother with that any more. No, that's when I do my washing!"

I had the impression that he felt that this might have been quite a shocking thing to have said at one time, there seemed a touch of bravado in his words.

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**CAMRA pub: descriptions taken from observation notes**

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| Group 1: 2 men, 1 woman | I went up to a man who had gone to the bar for another drink, explained what I was doing and asked if I could join his group. He agreed immediately, so I joined him and another man and woman.<br><br>The man I spoke to first was a plasterer. He said that he was now 66, but still working. He worked for himself, and it wasn't totally clear whether he was working full or part-time, and whether this was chosen or a result of the current economic climate. He explained why he was in the pub:<br><br>"I've been put on these tablets by the nurse, and I've put on over a stone. So I go walking every day, goes out in the morning, and I walk to here in the afternoon, so that's about 6 miles in all. Then I'm here for about 2 hours, so I just have the 4 pints like, then I catch the twenty past 6 bus back home."<br><br>He gave me a business card, so he appeared to be still seeking work regardless of his age, health or weight gain.<br><br>The couple he was sitting with had been in the pub when I arrived. The woman had worked as a nurse from the age of 17. She said that she was |

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| | the oldest of the group and was now retired, but her partner wasn't retired:

"He's still working though, can't give it up.  He drives taxies"

Her partner wasn't talkative, and I was unable to find out whether he was working because he needed the money or because he enjoyed having a job. We ended up talking generally about the pub and the beer.  Both the men had their own glasses, which were kept for them behind the bar at the pub.  The woman's partner joined in more in this conversation – he had his own glass at a couple of other pubs in the area. |
| Group 2:  14 men, 5 women | I commented to the landlord that the pub was full, and he replied that he had opened slightly early for the group sitting by the fire.  He explained that they were a group of Rail Ramblers, who planned walks from bus and train stations.  As he was explaining this, one of the group came to the bar, so the landlord introduced us and I then went to join them at their table.

My introductory reference to "older people" immediately set off comments (and complaints) about the bus pass system not being transferrable between Wales and England.  The group included people who lived within 3 miles of the pub, and others from as far away as 50 miles.  All the group held Older People's Railcards and bus passes.

Most of the group were retired, although two were working part-time. From appearance, and from comments from some about being in university in the 1960's, their ages seemed to range from late 50's to mid 70's.  They had just returned from a 14 mile walk, involving a significant level of ascent and in poor weather, so they must have been in good health.  Their main occupation seemed to be walking, with the associated socialising.  The "official" Rail Ramblers group walked every weekend and one Wednesday a month.  However, they walked every Wednesday.

 None of the group were members of an organised activity or committee apart from this one.  However, this appeared to take up a great deal of time and involve a high level of skills:

- All the group were accredited Walk Leaders (this requires a variety of skills including map reading & orienteering, first aid, risk assessment)
- Consequently, all the group led official walks during the year. This involved choosing and walking out a route in advance, calculating distance and ascent etc, finding out about associated train and bus times.
- Some organised 2-3 day trips to other areas, which involved planning walks, transport and also accommodation.
- One member was responsible for producing maps of all the walks planned, and of maintaining a library of walks for future reference.
- One member was responsible for producing and distributing the newsletters and leaflets advertising the walks |

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|---|---|
| | - One member was responsible for maintaining the web site<br>- One was a treasurer for the group<br><br>No one had an immediate awareness of the Strategy for Older People. When I mentioned it, they generally found the concept very amusing and joked about it being for certain members of the group (including one or two present), but definitely not for them as individuals.  When I said that the Strategy covered me, as I was over 50, they seemed to find this even funnier.  They were all quite definite that they would not want to be involved in anything to do with it, their response generally being:<br><br>"we don't have time …… we're too busy walking" |
| **Walking group:**<br>**Pen portraits of individuals quoted, taken from observation notes** | |
| Walk leader 1:  woman | This woman had lived in village all her life,was a retired public sector worker, and married.  She was involved in the Hospice Shop based in village, local Arts Centre and local park Heritage Lottery group.  She spoke Welsh and English. |
| Walk leader 2:  woman | This woman had lived in village all her life, was retired teacher and widowed.  She was involved in Hospice Shop based in village, local Arts Centre, local park Heritage Lottery group, local chapel.  She also had links with a number of choirs.  This woman missed a number of walks because she went on regular 3-5 day coach holidays with other people from the village.  These holidays were organised by someone in the village who was not a member of the walking group but was known to most of them (not a business venture, not part of an organised group, BTR activity).  She spoke Welsh and English |
| Walk leader 3:  woman | This woman moved to the village to marry husband, a local farmer. Originally from Lancashire, she still had a strong accent.  She frequently spoke of meeting with her relations from Lancashire, or of them going on holiday together in Wales, which she felt was made possible by her free bus pass as she did not drive.  I never observed her speaking Welsh, but she would take part in conversations where people would speak to her in Welsh and she would respond in English.  She had worked as a demonstrator and sales representative for a large cosmetic company, which had required her to travel throughout England and Wales during her working life.  On retirement, she had worked as a volunteer at the local Hospice.  Currently she volunteered twice a week at the local hospital café.<br><br>She attended most walks, missing a few in the summer because she was on holiday. |
| Woman | This woman was present at most walks.  She has lived in village all her life.  She was one of the older members of the group, and had some difficulty climbing stiles but said that she enjoyed the walks and the company.  Other group members were always patient, always offering to help her and often jokingly offering to lift or carry her. |

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|---|---|
| | This woman approached me on my first walk to say that her daughter was also called Llinos. "Llinos" is a very popular name in Welsh speaking communities, but very unusual in English speaking communities. I also regularly observed this woman speaking in Welsh to other members of the group. Consequently I was surprised when she spoke of not feeling able to attend the same chapel as her husband because she didn't feel able to participate in services in Welsh. Neither she nor her husband had attended church regularly, but in 2000 they decided to join the Church in Wales as they wished to renew their faith and they wished to worship together. Church in Wales services are held in English. Both she and her husband were involved in a number of activities linked to the church.<br><br>The woman was Treasurer for 2 Masonic Lodges. I erroneously assumed that Masonic Lodges were only open to men, but she corrected me:<br><br>"I am a Mason. My husband is a Mason, but I am a Mason too"<br><br>She went on to say that there were 6 Women Lodges in the area, and that the lodge that she belonged to had been in existence for 46 years.<br><br>The woman and her husband had had their own business: initially her husband had been an electrician, but after about 20 years he had decided to set up a photography business:<br><br>"and it had worked, at least, we had worked at it and it was a success. It made us a living"<br><br>They were now officially retired, but I gathered from a number of conversations that they were still operating the business on a smaller scale. |
| Man 1 | This man joined the group the same time as me and was present at all subsequent walks. He told me that he lived in about 14 miles away in a predominantly English speaking area, though he had lived in different parts of Wales in the past. He was never observed speaking in Welsh or taking part in conversations which were part Welsh part English, although he did not seem uncomfortable when people spoke Welsh around him.<br><br>He told me that he was gradually going out with all the walking groups advertised in the Healthy Walks programme:<br><br>"My wife passed away 6 months ago, and so I need something to do …. My son works for the Council here, and he found out about these walks, so I thought I'd give them a try."<br><br>He went on to talk about his grandchildren, and how he sometimes looks after them. He was not interested in getting involved with more serious walking groups, as he didn't have a great deal of time to give to it and wanted to keep time free for his family and for himself.<br><br>He also spoke about living near a university and so having lots of students |

| | |
|---|---|
| | as neighbours.  He appeared to get on well with them:<br><br>"When a new lot move in, I go to talk to them to tell them the rules.  Generally they're no trouble.  Sometimes their friends can be, especially if they have parties."<br><br>He spoke of a couple of occasions when pizza boxes or cigarette ends had been dropped into his garden.  He said that he didn't smoke himself, and so didn't like this.  He gave the impression that such incidents rarely happened more than once as he would speak with the students about it and it would stop. |
| Man 2 | This man attended most walks.<br><br>He was at least 6' tall and slender, and dressed differently from the rest of the group, wearing a baseball cap and tinted glasses. He drove a red BMW Z4.<br><br>This man lived about 14 miles away from the village, and wasn't observed speaking in Welsh but didn't appear uncomfortable when people spoke Welsh around him.  He didn't have a recognizable accent, and told me he had spent most of his working life living in Saudi Arabia working as an engineer for various American companies.  He had enjoyed the American approach:<br><br>"They'll get rid of you fast enough if you're no good, but they take good care of you if they like you"<br><br>He spoke at length about his views on the merits of the way of working in Saudi Arabia and what he saw as the weaknesses in the British system.<br><br>We went on to talk about how he'd come out with the walking group.  He said that when he was working in Saudi Arabia, over 60 people had his phone number and would phone him at any time if something went wrong – as they lived on a base there was no getting away from it.  When he retired he decided he didn't want any more responsibility.  He had joined an earlier walking group, when the scheme had first been established by Groundwork and had been a volunteer leader for a time, but stopped because he didn't "want the responsibility". |

# Appendix 5

**NPF terms of reference and membership**

## Terms of Reference

## (pages 7 & 8 of 24)

The terms of reference of the National Partnership Forum (NPF) are:

- To provide expert and informed advice to the Welsh Government on the development of its policies for the ageing population.
- To provide a focus and impetus for the debate of effective policies at all levels of government to benefit the ageing population.
- To support the development of effective government policies to benefit the ageing population
- To provide an effective channel of communication from individuals and their representatives, to local government, to Welsh Government and through to UK Government.

The NPF must make sure their work is aligned to these terms of reference.

## Current Forum Members

## (pages 20 & 21 of 24)

- Black and Minority Ethnic Elders (Older Minority Ethnic Network)
- Wales Carers Alliance
- Age Alliance Wales
- Disability Wales
- Learning Disability Wales
- Lesbian Gay Bisexual and Transgendered Older People (LGTB Elders)
- Wales Mental Health Alliance
- Transport Users Group
- Younger People (Funky Dragon)
- Housing Alliance (Homes for All)
- Chair of Pensioner Organizations
- Welsh Senate of Older People
- Regional Representatives from 50+ For a
- Chair of Community Health Councils Board

Representatives

- Education
- Employment
- Welsh Local Government Association (Officer level and political level)
- Research Community

Observers

- Department of Work and Pensions
- Commissioner for Older People
- Age Cymru
- Welsh Government
- Beth Johnson Foundation

# Appendix 6: Ageing Strategy Manager Diagram
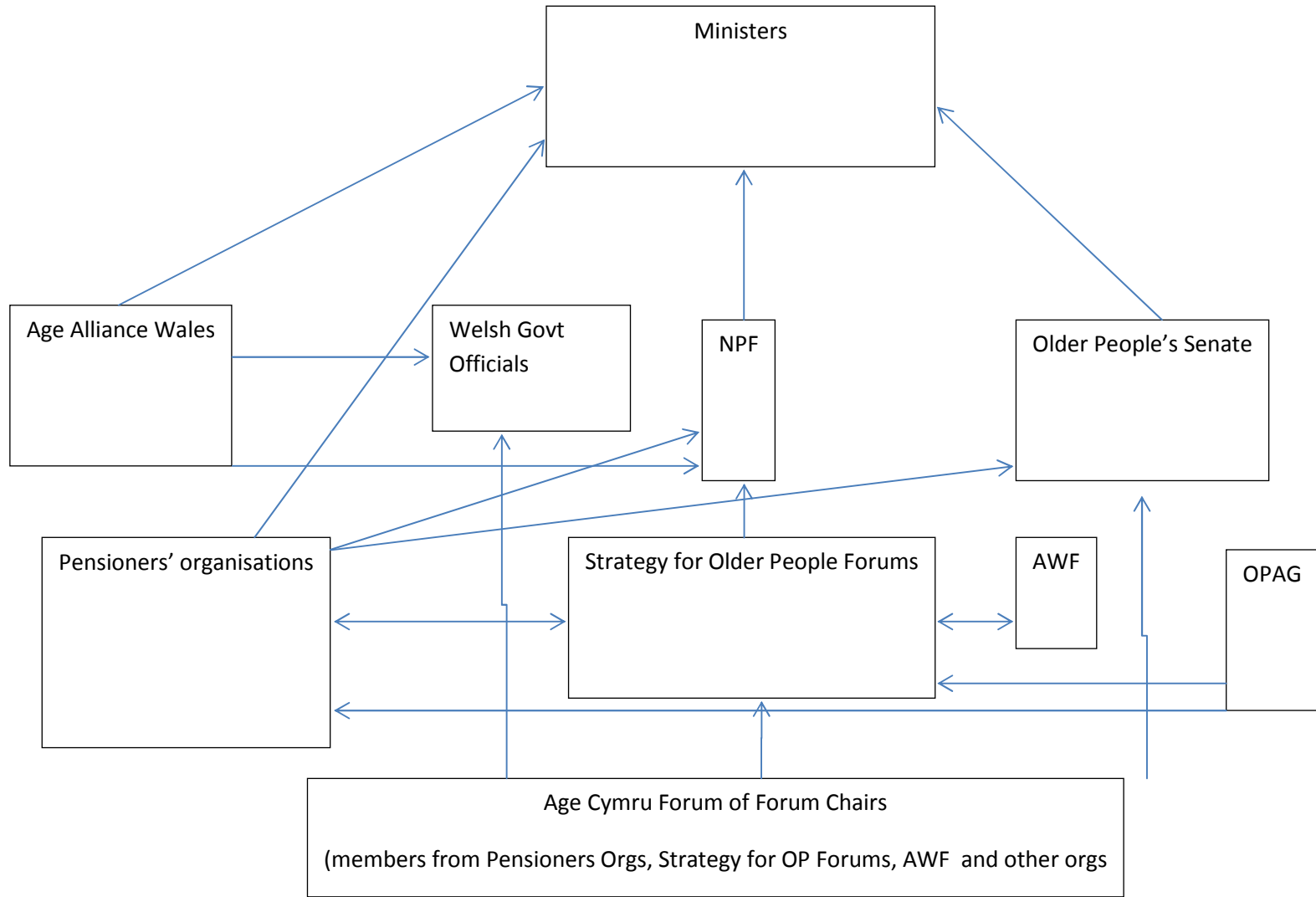
# ALL WALES FORUM

# Constitution
(Amended at Annual General Meeting 30/5/12)

**A**   Name
The group's name is

**B**   The purposes of the group are
- To enable the voices of older people to be heard and acknowledged
- To provide an effective, representative and independent advocate for older people's views
- To provide information on issues affecting older people
- To arrange opportunities for older people to network with service providers
- To monitor new services and developments that affect older people
- To provide Government, statutory, voluntary and private organisations with the views of older people about existing and proposed services
- To influence policy and practice concerning current and future older people at a local, regional and national level, to include lobbying as appropriate
- To pursue the implementation of the UN Principles for Older Persons (1991) and the Equality Act 2010 to eliminate age discrimination
- To monitor the Strategy for Older People in Wales
- Work together with Government, Statutory, Voluntary and Public Organisations to achieve common aims
- Maintain our independence
- Challenge incomplete and ineffectual consultation and involvement
- Aim to be involved in the design and decision making prior to consultations being released.

**C**   Carrying out the purposes
In order to carry out the purposes,             has the power to
(1)   raise funds, receive grants and donations

1

(2)  co-operate with and support other groups with similar purposes
(3)  do anything else within the law which is necessary to achieve the purposes

**D   Membership**

████████ may admit to membership any established older people's forum or group that supports the purposes of ████ Membership is limited to:

(i)   two representatives from each Local Authority Area. Of those one representative should be from an Older People's Strategy Forum.

(ii)  one representative from each of the national organisations of older people.

(iii) Founder members: in addition to the membership criteria defined in D(i) and D(ii) above, membership shall be granted to those who were involved in ████ (i.e. present at meetings) up to and including the signing of the Constitution and who are themselves older people and who wish to hold such membership. This membership confers equal membership status as in the two primary categories.

████ will keep an up to date membership list.

New membership will be admitted by application, decisions will be made by the current membership

Members representing a group have a duty to ensure that their group is represented at ████ meetings.

████ member organisations are allowed to send a deputy to any ████ meeting in the event that any of their usual representatives cannot attend.

Where a member has not attended three (3) consecutive meetings without submitting apologies the Link Officer should write to that member stating the dates of the ████ meetings missed and requesting a declaration of intention to attend future meetings. If no reply is received ████ A may resolve to remove them from membership.

2

## Appendix 8

**50+ Forum  newsletter October 2011**

Newsletter

## October 2011

**MEMBERSHIP NEWS** membership now stands at 1036

What happens now?

The funding for the            Over 50's Forum has been tapering over the years and now it looks like there will be no more funding for          from the Welsh Government.

So what happens now  and what does it mean for the 1036 members?

Who will represent the older people of              ?

How will the Council and Welsh Government know what issues the older people are facing if there isn't a body to consult with?

Read the article on the next page for further details.

County Borough of
Over 50s Forum

*Nothing decided about us without us*

## Appendix 9

**Ethics documentation:  approved 22 November 2011**

**CBSSL Ethics Committee**

**Llinos Mary Jehu, Student 500241850**

**Declaration**

I certify that I have read the Research Ethics Policy of the university and believe that my research proposal requires ethical review.  The relevant ethical issues are addressed as follows:

Introductory letters, consent forms and information sheets will be produced for participants who are knowingly involved in the research.

Steps will be taken to ensure that participants who do not give full and informed consent are not easily identifiable, for example by not giving details of the time and venue that the observation took place, or of names or other identifying characteristics.

A Criminal Records Bureau check will be undertaken if judged necessary (Currently I hold Enhanced Disclosure certificates from Isle of Anglesey County Council , Conwy County Borough Council and SGS Ltd).

Hard copies of data will be stored securely in a locked cabinet in the School of Social Sciences Post Graduate Room (this room is also locked).  Related electronic data will be password protected and stored on the Bangor University portal.   All data will be retained according to data protection requirements (in a safe place within the University until an agreed date after the PhD is awarded).

To ensure my personal safety when carrying out fieldwork, I will ensure that a responsible person knows of my plans and will take suitable action should I fail to contact them at the agreed time.

There is a protocol for responding to disclosure of information that is suggestive that a vulnerable adult may be at risk or that criminal activity may have taken place.  This is based on the North Wales Policy and Procedure for the Protection of Vulnerable Adults (POVA).

**CBSSL Ethics Committee**

**Llinos Mary Jehu, Student 500241850**

**Declaration**

I certify that I have read the Research Ethics Policy of the university and believe that my research proposal requires ethical review. The relevant ethical issues are addressed as follows:

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Steps will be taken to ensure that participants who do not give full and informed consent are not easily identifiable, for example by not giving details of the time and venue that the observation took place, or of names or other identifying characteristics.

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There is a protocol for responding to disclosure of information that is suggestive that a vulnerable adult may be at risk or that criminal activity may have taken place. This is based on the North Wales Policy and Procedure for the Protection of Vulnerable Adults (POVA).

Signed *Llinos Jehu*

Date 4/11/2011

*Final version footer to show page number and date of issue*

# Public Sector Multi Agency Partnerships

# Information Sheet for People involved with 50+ Forum

## Information about the research

I am carrying out this research study for my PhD. After spending many years working in the statutory and voluntary sectors, and having now become an "older person" myself, I've decided to go back to university and try to find out how and why people work together to provide services for older people.

I would like to invite you to take part in my research study. Before you decide, I would like you to understand why the research is being done and what it would involve for you. I can go through the information sheet with you and answer any questions you have. I'd suggest this should take about 10 minutes. Talk to others about the study if you wish.

**Purpose**

The purpose of this study is to find out what "collaborative working" means to different people, to find out people's views of why it is promoted in government policy, and to find out why some people want to be involved and others do not.

**Why have I been invited?**

You are being invited to participate because you are involved in a forum for people over 50.

This is because the Welsh Government's Strategy for Older People covers everyone over the age of 50.

**Do I have to take part?**

It is up to you to decide to join the study. I will describe the study and go through this information sheet. If you agree to take part, I will then ask you to sign a consent form. You are free to withdraw at any time, without giving a reason.

**What will happen if I take part?**

- The study will last for about 6 months
- I will attend 2 of the Forum meetings, record on tape and make notes of what happens, both during the meeting itself and during the informal periods around it, such as during the coffee break. If people are willing, I might also take some photographs.
- If you are willing, I would like to meet with you for an individual interview to discuss your involvement with the forum. There will not be set questions. I will give you a list of the areas I would like to discuss before we meet, but if you do not wish to discuss these, or if there are other things you would like to talk about, we can do that. I will make notes and, if you are willing, this meeting will also be taped.

**Expenses and payments**

If you are willing to be interviewed, I will visit you at a time and place that suits you best. If you incur any costs as a result, for example travel costs or costs for paying for a carer, then these will be reimbursed by me. You will be asked to fill in a form and, if possible, provide receipts and the amounts should be reasonable.

**What are the possible risks of taking part?**

People are sometimes concerned that their comments may be seen as criticism of a service, and that they or their family will suffer as a result. When I write my thesis, I will not use your name to identify you or associate you with any comments made.

**What are the possible benefits of taking part?**

I cannot promise the study will help you, but I hope to pass the information I get from this study on to people who make decisions on how services are planned and how people and organizations should work together in the future.

**What if there is a problem?**

If you are concerned, or wish to complain about the way you have been dealt with during the study, please contact:

Professor Ian Rees Jones
Head of School
School of Social Sciences
Bangor University
Bangor
Gwynedd
LL57 2DG
Phone 01248 382222

**Will my taking part in the study be kept confidential?**

Definitely. Paper copies of information will be stored securely in a locked cabinet at my home. Computer copies will be password protected and stored through Bangor University. All information will be stored in a safe place within the University until an agreed date after my PhD is awarded.

**What happens if I want to withdraw from the study?**

You can withdraw at any time. If you withdraw, I will destroy all information relating directly to you.

**Further information and contact details**

Further information on this study can be obtained from

School of Social Sciences, Bangor University
Bangor
LL57 2DG
Phone 01248 382222

My contact details are:
Llinos Mary Jehu
Email sopc01@bangor.ac.uk
Phone 07971 400826

# Public Sector Multi Agency Partnerships

# Information Sheet for People not involved with 50+ Forum

# Information about the research

I am carrying out this research study for my PhD. After spending many years working in the statutory and voluntary sectors, and having now become an "older person" myself, I've decided to go back to university and try to find out how and why people work together to provide services for older people.

I would like to invite you to take part in my research study. Before you decide, I would like you to understand why the research is being done and what it would involve for you. I can go through the information sheet with you and answer any questions you have. I'd suggest this should take about 10 minutes. Talk to others about the study if you wish.

**Purpose**

The purpose of this study is to find out what "collaborative working" means to different people, to find out people's views of why it is promoted in government policy, and to find out why some people want to be involved and others do not.

**Why have I been invited?**

You are being invited to participate because you are someone over the age of 50. This is because the Welsh Government's Strategy for Older People covers everyone over the age of 50.

**Do I have to take part?**

It is up to you to decide to join the study. I will describe the study and go through this information sheet. If you agree to take part, I will then ask you to sign a consent form. You are free to withdraw at any time, without giving a reason.

**What will happen if I take part?**

- I will join your group and, if you are willing, I will chat to you about why you are on the trip, how you spend your days otherwise, the people you see and the things you do etc.  If you agree, I will tape these conversations and may take some photographs.  If you would prefer not to be taped, I will make notes later.
- If you are willing, I would like to meet with a group of you to talk about your views on the part that people over 50 play in society.  There will not be set questions, and it will last for as long as people want to carry on talking to me.  This meeting will also be taped, or if you prefer I will make notes.

**What are the possible risks of taking part?**

People are sometimes concerned that their comments may be seen as criticism of a service, and that they or their family will suffer as a result. When I write my thesis, I will not use your name to identify you or associate you with any comments made.

**What are the possible benefits of taking part?**

I cannot promise the study will help you, but I hope to pass the information I get from this study on to people who make decisions on how services are planned and how people and organizations should work together in the future.

**What if there is a problem?**

If you are concerned, or wish to complain about the way you have been dealt with during the study, please contact:

Professor Ian Rees Jones
Head of School
School of Social Sciences
Bangor University
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Gwynedd
LL57 2DG
Phone 01248 382222

**Will my taking part in the study be kept confidential?**

Definitely.  Paper copies of information will be stored securely in a locked cabinet at my home.  Computer copies will be password protected and stored through Bangor University.   All information will be stored in a safe place within the University until an agreed date after my PhD is awarded.

**What happens if I want to withdraw from the study?**

You can withdraw at any time.  If you withdraw, I will destroy all information relating directly to you.

**Further information and contact details**

Further information on this study can be obtained from

School of Social Sciences, Bangor University
Bangor
LL57 2DG
Phone 01248 382222

My contact details are:
Llinos Mary Jehu
Email sopc01@bangor.ac.uk
Phone 07971 400826

# Public Sector Multi Agency Partnerships

## People involved with 50+ Forum

## CONSENT SHEET FOR OBSERVATION OF MEETINGS

I have read the information sheet and I:

| | | |
|---|---|---|
| Consent to have Forum meetings and the informal periods around proceedings being observed | YES | NO |
| Consent to have Forum meetings and the informal periods around proceedings being taped | YES | NO |
| Consent to having photographs taken | YES | NO |
| Please tick to show if you give consent. YOU DO NOT HAVE TO GIVE CONSENT TO EVERYTHING | | |
| NAME (please print): …………………………………………………….. | | |
| ADDRESS: …………………………………………………………….. ……………………………………………………………………………… ……………………………………………………………………………… | | |
| POSITION IN FORUM: ……………………………………………………. | | |
| SIGNED: ……………………………………………………………………. DATE: ……………………………………………………………………... | | |

# Public Sector Multi Agency Partnerships

## People involved with 50+ Forum

## CONSENT SHEET FOR INDIVIDUAL INTERVIEWS

I have read the information sheet and I:

| | | |
|---|---|---|
| Consent to being interviewed and notes being taken | YES | NO |
| Consent to having the interview taped | YES | NO |
| Please tick to show if you give consent. YOU DO NOT HAVE TO GIVE CONSENT TO EVERYTHING | | |
| NAME (please print): …………………………………………………….. | | |
| ADDRESS: …………………………………………………………………….. …………………………………………………………………………………… …………………………………………………………………………………… | | |
| POSITION IN FORUM: ……………………………………………………. | | |
| SIGNED: ……………………………………………………………………. DATE: …………………………………………………………………….. | | |

# Public Sector Multi Agency Partnerships

## People not involved with 50+ Forum

## CONSENT SHEET FOR EVENT ………………………….

I have read the information sheet and I:

| | | |
|---|---|---|
| Consent to your joining this event to observe and chat to people | YES | NO |
| Consent to being taped | YES | NO |
| Consent to having photographs taken | YES | NO |
| Please tick to show if you give consent. YOU DO NOT HAVE TO GIVE CONSENT TO EVERYTHING | | |
| NAME (please print): ……………………………………………………….. | | |
| ADDRESS: ……………………………………………………………….. <br> …………………………………………………………………………… <br> …………………………………………………………………………… | | |
| SIGNED: ………………………………………………………………. <br> DATE: ……………………………………………………………….. | | |

**Letter of Invitation to Chair and Coordinator of 50+ Forum (Groups 1 & 2)**


Dear XXXX


I am writing to ask if the XXX 50+ Forum would be willing to assist with my research.

I am carrying out this research study for my PhD.  After spending many years working in the statutory and voluntary sectors, and having now become an "older person" myself, I've decided to go back to university and try to find out how and why people work together to provide services for older people.

The purpose of this study is to find out what "collaborative working" means to different people, to find out people's views of why it is promoted in government policy, and to find out why some people want to be involved and others do not.

Information detailing how the research would be carried out is attached.  This information would be given to all members of the Forum, and individuals would be asked to consent to being participants.  In the first instance, I would be grateful for an opportunity to attend a Forum meeting to give a short presentation outlining what I propose to do and to answer questions, so that the Forum can then decide whether to consent to taking part.

If you require any further information, please contact me.


I look forward to hearing from you.


Yours sincerely



Llinos Mary Jehu

**Letter of invitation to leader of pilot day event (Group 3)**

Dear XXXX

I am writing to ask if NAME OF GROUP would be willing to assist with my research.

I am carrying out this research study for my PhD.  After spending many years working in the statutory and voluntary sectors, and having now become an "older person" myself, I've decided to go back to university and try to find out how and why people work together to provide services for older people.

The purpose of this study is to find out what "collaborative working" means to different people, to find out people's views of why it is promoted in government policy, and to find out why some people want to be involved and others do not.

Information detailing how the research would be carried out is attached.  This information would be given to all members of THE GROUP, and individuals would be asked to consent to being participants.  In the first instance, I would be grateful for an opportunity to meet with THE GROUP  to answer questions, so that they can then decide whether to consent to taking part.

If you require any further information, please contact me.

I look forward to hearing from you.

Yours sincerely

Llinos Mary Jehu

**Letter of invitation to leader of event (Group 3)**


Dear XXXX


I am writing to ask if NAME OF GROUP would be willing to assist with my research.

I am carrying out this research study for my PhD.  After spending many years working in the statutory and voluntary sectors, and having now become an "older person" myself, I've decided to go back to university and try to find out how and why people work together to provide services for older people.

The purpose of this study is to find out what "collaborative working" means to different people, to find out people's views of why it is promoted in government policy, and to find out why some people want to be involved and others do not.

Information detailing how the research would be carried out is attached.  This information would be given to all members of THE GROUP, and individuals would be asked to consent to being participants.  In the first instance, I would be grateful for an opportunity to meet with THE GROUP  to answer questions, so that they can then decide whether to consent to taking part.

If you require any further information, please contact me.


I look forward to hearing from you.


Yours sincerely



Llinos Mary Jehu

# Public Sector Multi Agency Partnerships

## People involved with 50+ Forum

## Protocol for responding to disclosure that a vulnerable adult may be at risk or that criminal activity may have taken place

As the research will not be carried out within a specific service setting or within the domain of a specific service provider, it is proposed to follow the North Wales Policy and Procedure for the Protection of Vulnerable Adults (POVA). The Policy and Procedure Introduction states that:

> "All agencies have a duty to work together to protect vulnerable adults. The identification, assessment, protection and care of vulnerable adults at risk is a multi-disciplinary, inter-agency responsibility, which should involve anyone with relevant knowledge to ensure the safety and wellbeing of the individuals concerned.
>
> Staff, professionals, managers and volunteers working in health and social care have a duty to raise concerns about vulnerable adults under the Public Interest Disclosure Act and to report any suspicion or allegation of abuse.
>
> Where a criminal offence is suspected, (e.g assault, rape, fraud, theft or other financial exploitation), the responsibility for initiating action is with the police and Crown Prosecution Service. In these cases, the police must be involved as a matter of urgency.
>
> The sharing of information between agencies is paramount for vulnerable adult protection work. Good communication, co-operation and liaison between agencies and disciplines are essential, and the responsibility of every worker and agency.
>
> Wherever possible, abuse must be prevented. Agencies should take all steps possible to reduce the likelihood of abuse and to promote measures which reduce the likelihood of abuse."

The Policy and Procedure goes on to state that

> "Everyone has a duty to report allegations or suspicions of adult abuse to their line manager, or to Social Services or the Police. This includes abuse in a service setting, or by someone with whom the vulnerable adult has a personal or professional relationship."

Paragraph 2.2.5

Any disclosure or concern will be reported to the POVA Coordinator in the local authority in which the research is being carried out, using the prescribed Incident Report Form. The disclosure or concern will then be dealt with through the POVA process. Copies of the Incident Report Form and the Summary of Process for Adult Protection are attached.

# SUMMARY OF PROCESS FOR ADULT PROTECTION

**Within 24 hours** — Disclosure/Concern raised through **Initial Contact/Referral – Complete Incident Report** — Stage 1

Is urgent action needed?
- No → Inform Appropriate Manager (App.Mgr) within Social Services
- Yes → Take necessary action App Manager, liaises with: Police/CSIW/Contracts/ Placing Authority as required

No

Initial information gathering by Appropriate Manager/Interagency **Strategy Discussion** → Information recorded — Stage 2

**Day 1-2** — Is strategy meeting needed?
- Yes → App. Mgr. arranges meeting
- No → App Mgr. agrees to support care needs & signs off case as adult protection and App Mgr. gives feedback to referrer/vulnerable adult — Stage 3 — End

**By Day 3** — If crime alleged, Police take lead in investigation

**Strategy Meeting held** Actions agreed. Investigating Officer(s) appointed if required. Form **PVA 1** completed

If non-criminal: Social Services/health/CSIW/ Contracts lead (as required)

**Investigation/Assessment** report carried out by appointed person(s) — Stage 4

Is Adult Protection Case Conference needed?
- Yes → Appropriate Managers arranges **Adult Protection Case Conference** which identifies future actions/ adult protection plans agreed and key worker appointed and review date set. Complete PVA 2. — **By Day 15**
- No → App Mgr records decision and considers actions needed relating to risk management, support, monitoring. App Mgr sets review date and if necessary appoints key worker and feedback to referrer/vulnerable adult — Stage 5

**Review Adult Protection Plan.** Review takes place within 3 months or as within time scale determined by Case Conference and subsequent review dates set. — End — Stage 6

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# Incident Report - Alleged Abuse of Vulnerable Adult

| |
|---|
| To be completed by staff member discovering, observing or receiving a disclosure of alleged abuse relating to a vulnerable adult. |
| Name of Vulnerable Adult |
| Address                      Tel No. |
| Please describe below what happened. Include details of incidents which you saw, and of incidents which were reported to you. |
| Where the incident was reported to you please give details of the referrer |
| Name                      Address/Contact No. |
| Relationship to the abused person |
| Action taken (include people contacted) |
| Has the alleged abused person indicated what (if anything) they want done about the abuse? |
| Form completed by Name |
| Job Title/Designation |
| Signature                   Date |

**This form to be handed to your line manager or appropriate manager.**
Note to Line Manager – Please send a copy to Adult Protection Co-ordinator for information

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# APPENDIX 10

**Network maps – large scale**

## Map 1

Networks between individuals and:

- Statutory organizations
- Formal voluntary organizations
- Social groups
- Faith based groups

| Organizations | | |
|---|---|---|
| Individuals or groups | | |
| CAMRA pub | Group | |
| Village walking group | Group | |
| Town centre pub | Group | |
| Forum | Forum Janet<br>Forum Lucia<br>Forum Maria<br>Forum Margot<br>Forum May<br>Forum Bronwen<br>Forum Eileen<br>Forum Liz<br>Forum Deborah<br>Forum Catherine | Forum Alice & Jennifer<br>Forum Emma<br>Forum Hillary<br>Forum Sharon<br>Forum A – member observed but not interviewed |
| AWF regional group | AWF John (one of 4 regional chairs)<br>AWF A, B, C – members observed but not interviewed | |

**Map 1**



AWF A

WCVA

AWF local group

AWF B

AWF C

AWF

Froum Eileen

Town centre

UK government

dignitaries, royalty etc

Forum Lucia

Forum Maria

AWF John

Forum Hillary

Social groups

CAMRA pub

Forum Liz

Forum Margot

Action based voluntary groups

Village walking group

regional voluntary org

Welsh government

Forum Bronwen

Health board

Forum

Faith groups

CVSC

NPF other members

Forum A

Forum Deborah

Forum Alice & Jennifer

Forum Janet

Forum May

Forum Sharon

Forum Catherine

Forum Emma

Other strategic planning groups

**Map 2**

Networks between older people and organizations involved with the Strategy for Older People in Wales
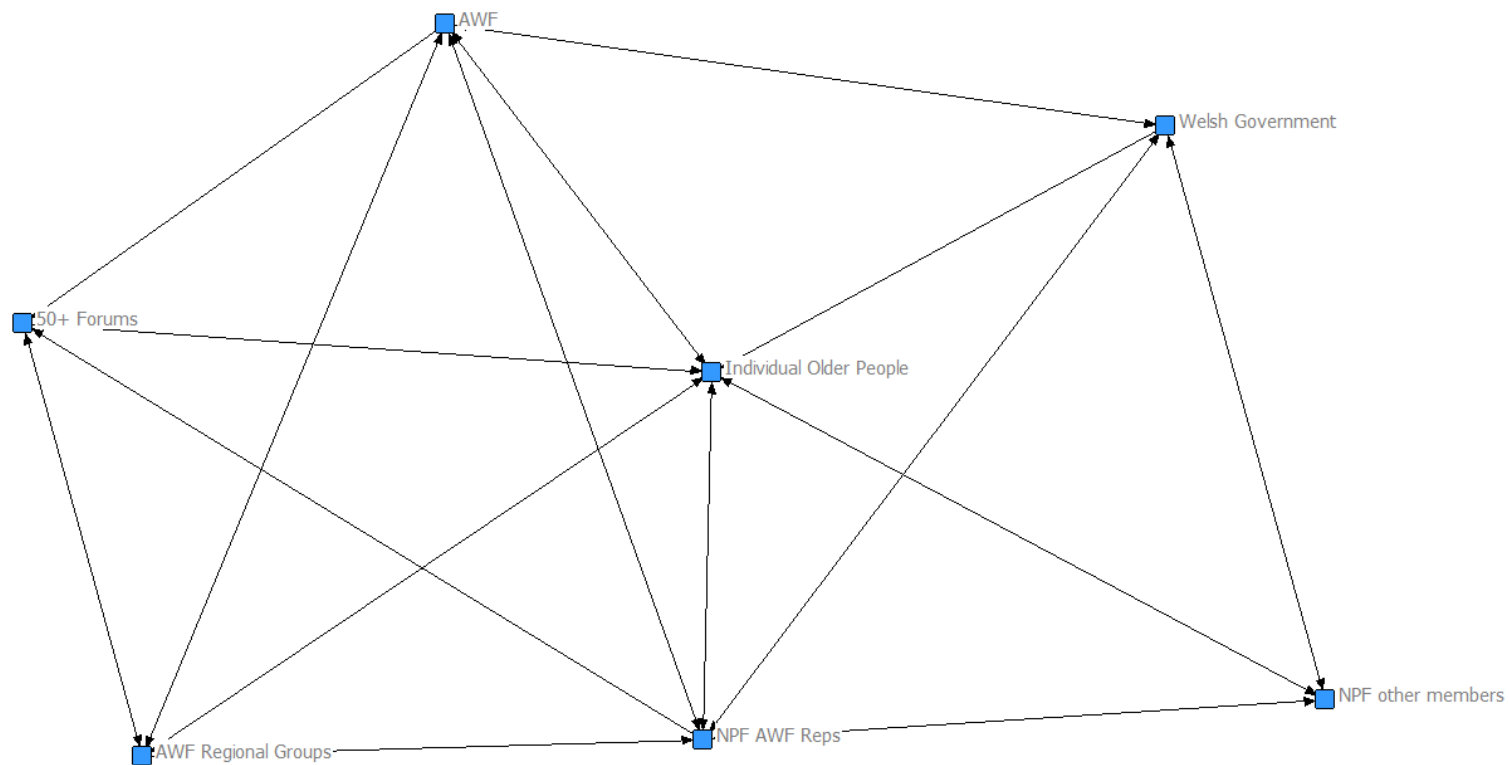
## Map 3

Networks between data sample groups and social groups or societies

| Data sample groups | |
|---|---|
| Social groups or societies | |

CAMRA pub

Walking group

CAMRA pub

U3A

Hospital/hospice volunteers

Faith based societies

AWF

Masons

Village walking group

Forum

Town centre pub

WI

Village miners club

Italian community

Welsh speaking community

music societies

Town centre pub

**Map 4**

Networks between individual members of the data sample groups and social groups or societies

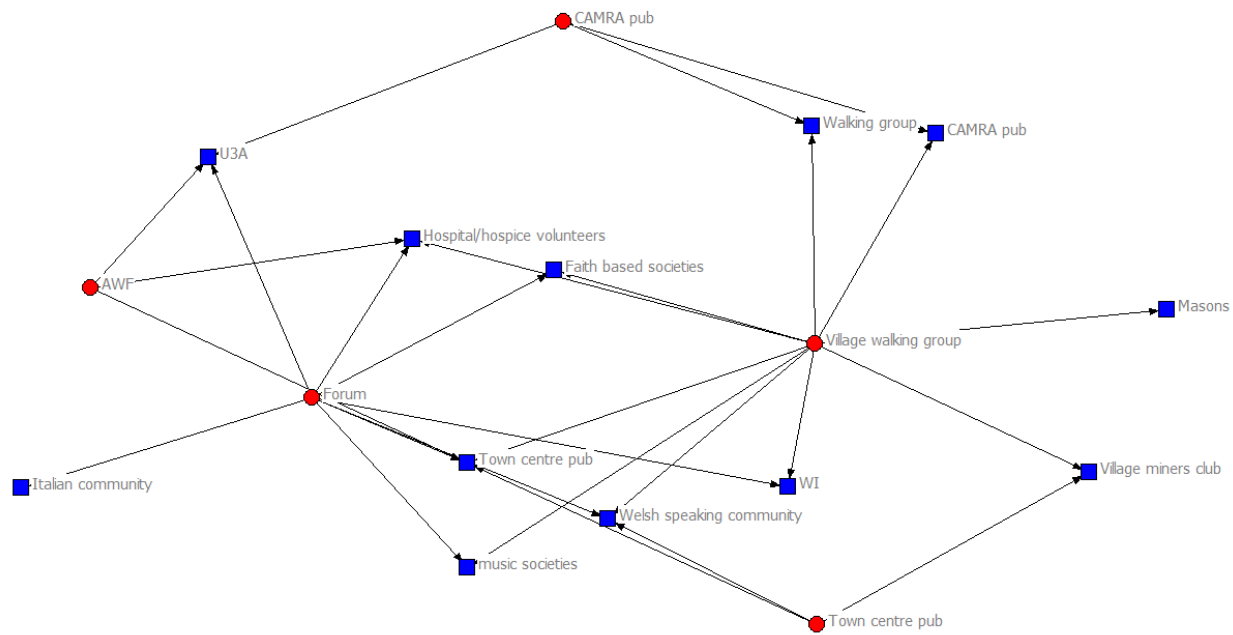| Organizations | | |
|---|---|---|
| Individuals or groups | | |
| CAMRA pub | Group | |
| Village walking group | Group | |
| Town centre pub | Group | |
| Forum | Forum Janet<br>Forum Lucia<br>Forum Maria<br>Forum Margot<br>Forum May<br>Forum Bronwen<br>Forum Eileen<br>Forum Liz<br>Forum Deborah<br>Forum Catherine | Forum Alice & Jennifer<br>Forum Emma<br>Forum Hillary<br>Forum Sharon<br>Forum A – member observed but not interviewed |
| AWF regional group | AWF John (one of 4 Regional Chairs)<br>AWF A, B, C, D, Kenneth – members observed but not interviewed | |
| AWF regional chair | Chair of another AWF Regional Group, observed at All Wales AWF event and at AWF regional event in data collection area.  Referred to during Forum meetings. | |

**Map 4**
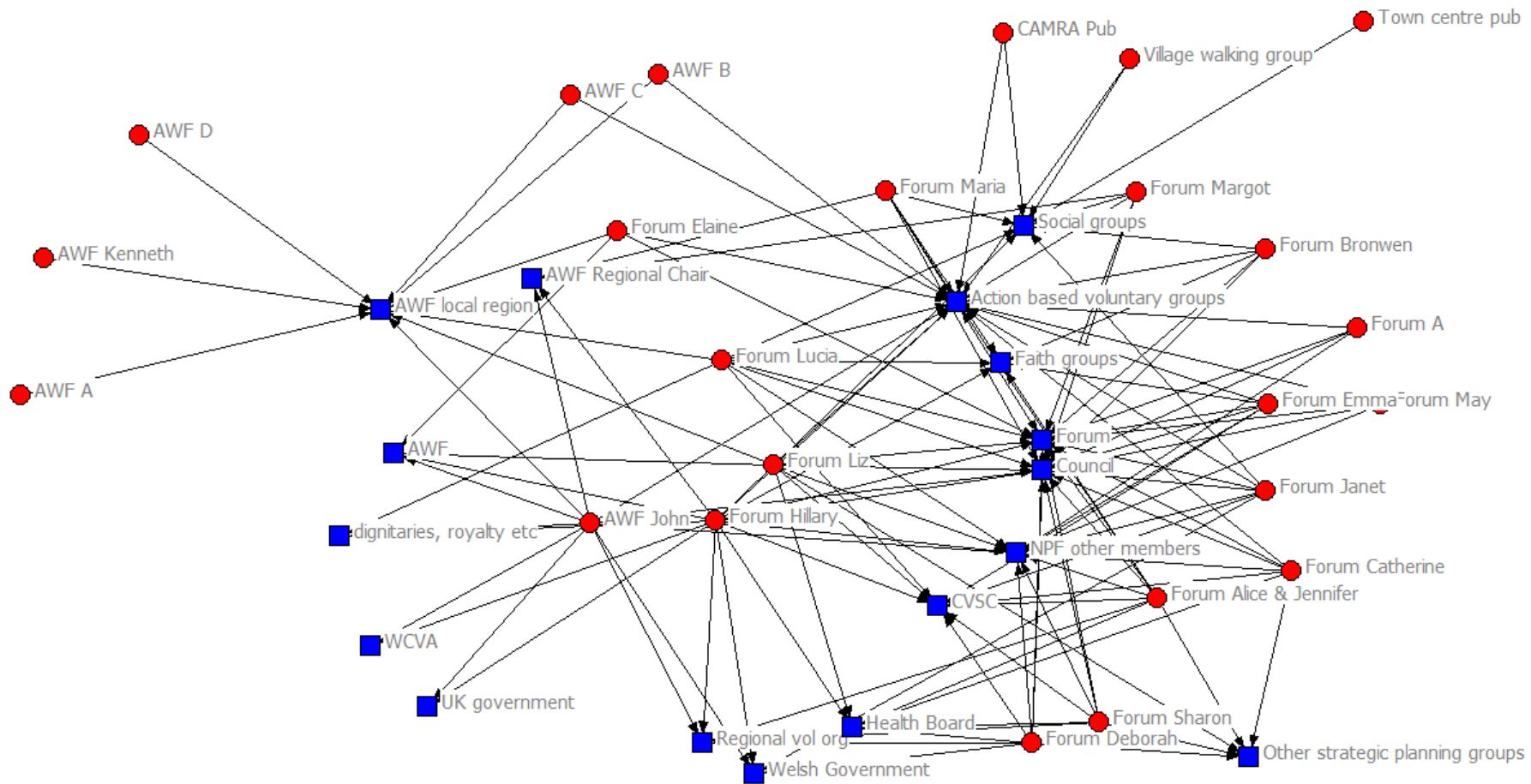
## Map 5

Networks between individual members of the data sample groups and:

- Formal voluntary organizations
- Statutory organizations

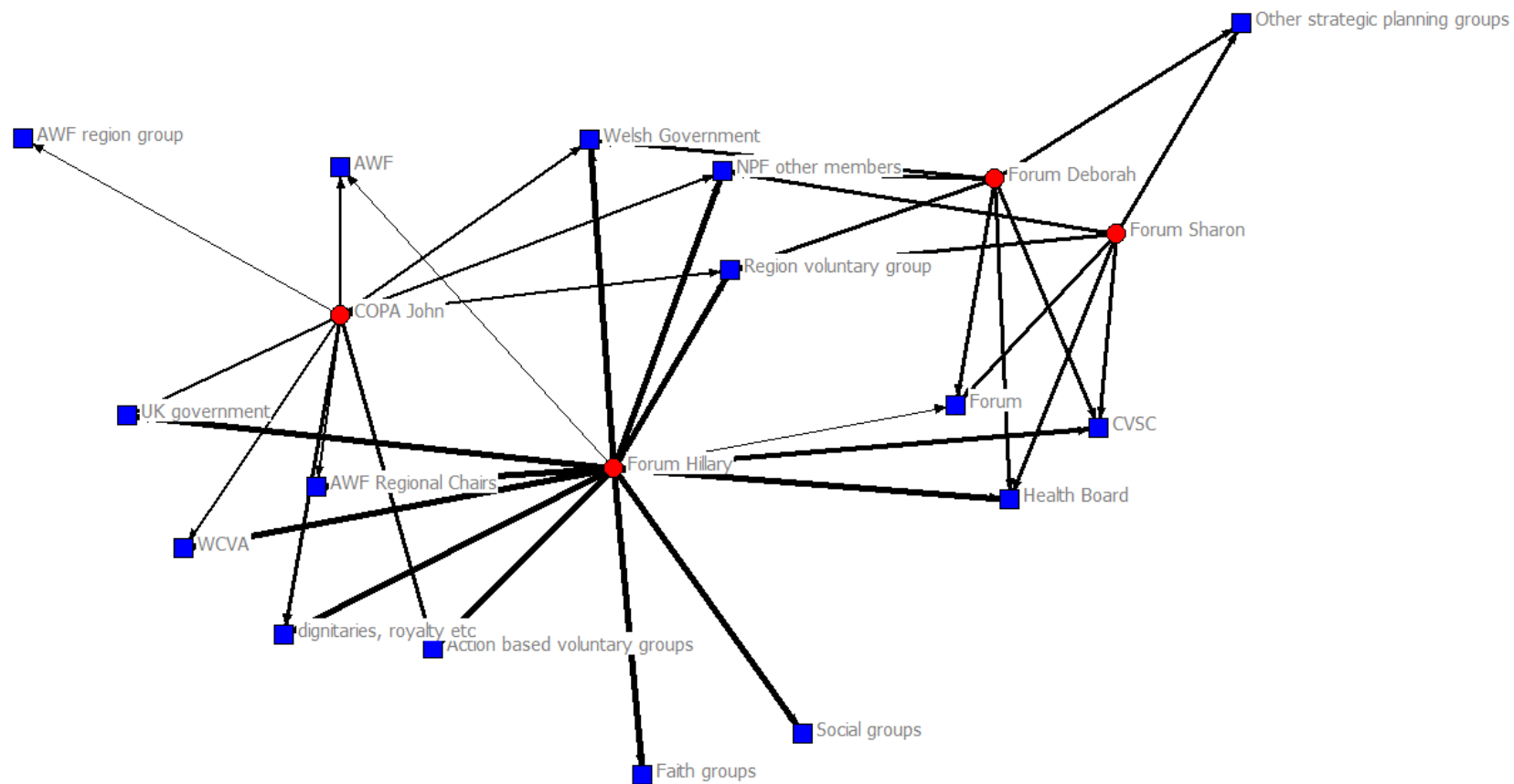| Organizations | | |
|---|---|---|
| Individuals or groups | | |
| CAMRA pub | Group | |
| Village walking group | Group | |
| Town centre pub | Group | |
| Forum | Forum Janet<br>Forum Lucia<br>Forum Maria<br>Forum Margot<br>Forum May<br>Forum Bronwen<br>Forum Eileen<br>Forum Liz<br>Forum Deborah<br>Forum Catherine | Forum Alice & Jennifer<br>Forum Emma<br>Forum Hillary<br>Forum Sharon<br>Forum A – member observed but not interviewed |
| AWF regional group | AWF John<br>AWF A, B, C, D, Kenneth – members observed but not interviewed | |
| AWF Regional Chair | Chair of another AWF Regional Group, observed at All Wales AWF event and at AWF regional event in data collection area.  Referred to during Forum meetings. | |

**Map 5**



- Action based voluntary groups
- AWF C
- AWF B
- Village walking group
- Forum Margot
- CAMRA Pub
- AWF A
- Town centre pub
- Forum Elaine
- Forum Maria
- Forum Bronwen
- AWF Kenneth
- Social groups
- AWF
- Other strategic planning groups
- Welsh Government
- Forum A
- Forum Lucia
- Forum Emma
- AWF D
- Forum May
- Regional vol org
- Forum Liz
- Council
- Forum Janet
- AWF local region
- AWF John
- AWF Regional Chair
- Forum Catherine
- UK government
- Forum Hillary
- Health Board
- NPF other members
- Forum Alice & Jennifer
- Forum Sharon
- WCVA
- CVSC
- Forum Deborah
- Faith groups
- Forum
- dignitaries, royalty etc

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## Map 6

Networks between Hillary, John, Deborah and Sharon, weighted according to the age of the network tie
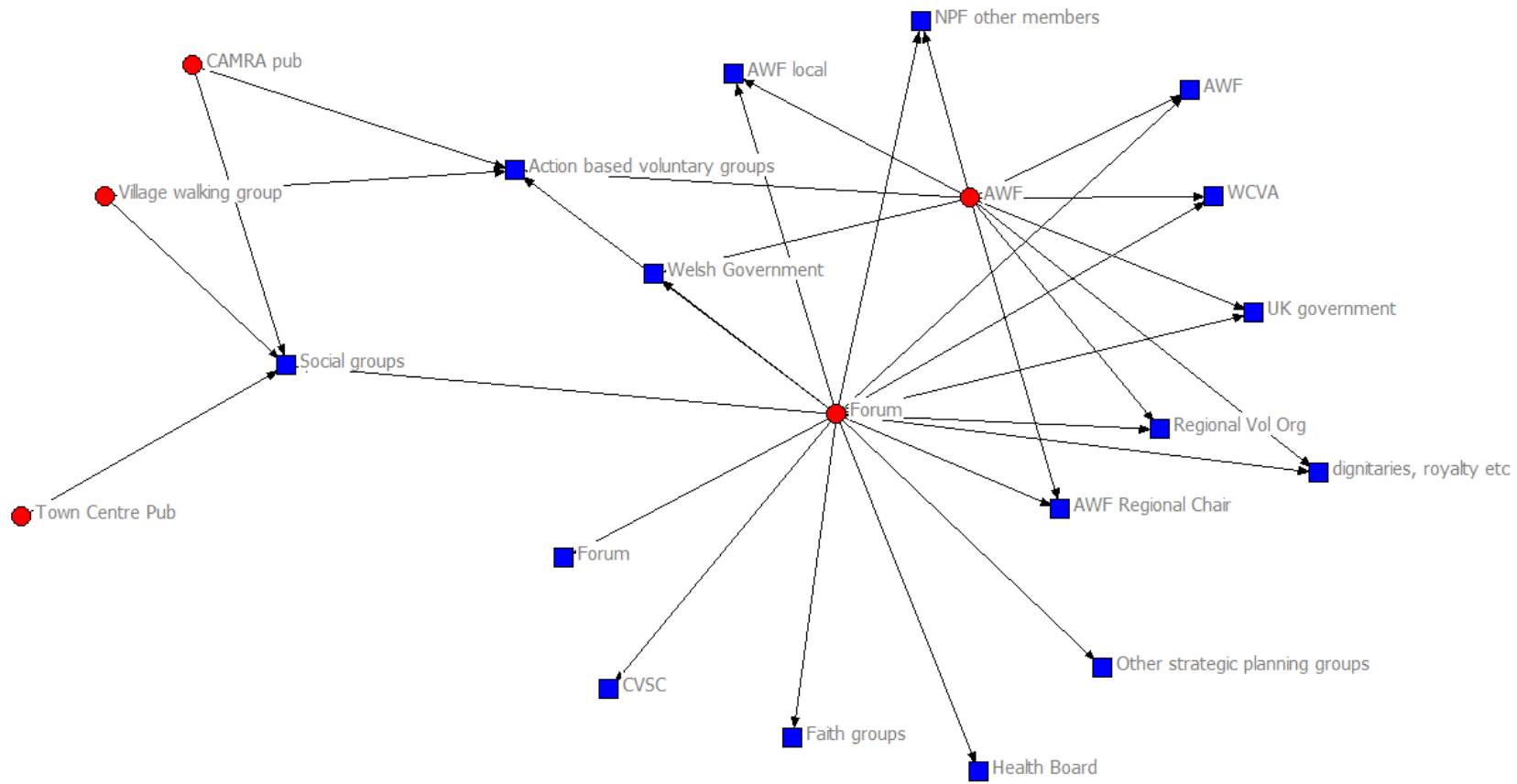
**Map 7**

Links between data sample groups and:

- Planning groups
- Statutory organizations
- Established voluntary groups

| | |
|---|---|
| Data sample groups | <span style="color:red">■</span> |
| Planning groups, statutory organizations, established voluntary organizations | <span style="color:blue">■</span> |

**Map 7**



NPF other members

AWF local

AWF

CAMRA pub

Action based voluntary groups

AWF

WCVA

Village walking group

Welsh Government

UK government

Social groups

Forum

Regional Vol Org

dignitaries, royalty etc

Town Centre Pub

AWF Regional Chair

Forum

Other strategic planning groups

CVSC

Faith groups

Health Board

# Appendix 11: Procedural justice

*Based on Rawls 1972, 85-87*

| Perfect procedural justice | Imperfect procedural justice | Pure procedural justice |
|---|---|---|
| • Independent criterion of what is a fair division, defined separately from and prior to the procedure<br>• It is possible to devise a procedure that is sure to give the desired outcome | • Independent criterion for the correct outcome<br>• No feasible procedure which is sure to lead to it | • No independent criterion for the right result<br>• Correct or fair procedure such that the outcome is likewise correct or fair, whatever it is, provided that the procedure has been properly followed |
| Example: A number of men are to divide a cake: assuming that a fair division is an equal one the solution is to have one man divide the caked and get the last piece, the others being allowed to pick before him. He will divide the cake equally since in this way he assures for himself the largest share possible | Example: criminal trial. Desired outcome is that the defendant should be declared guilty if and only if he has committed the offense. Different arrangements for hearing cases may reasonably be expected, but even though carefully followed, the wrong decision may be reached. Injustice spring from a "fortuitous combination of circumstances which defeats the purpose of the legal rules" | Example: gambling. If a number of persons engage in a series of fair bets, the distribution of cash after the last bet is fair, or at least not unfair, whatever this distribution is. |

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